AUXDATA Overview Guide

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1. PREFACE

1.1 Purpose

This document has been developed to provide U.S. Coast Guard (USCG) Auxiliary users with instructions and information necessary to use the Auxiliary Data (AUXDATA) system. The goal of this document is to provide the Auxiliary with an Overview Guide for training new personnel and guidelines for using the AUXDATA system.

1.2 Intended Audience

The following is a list of groups for whom this document was created:

- Assistant Commandant of Operations (G-O)

- Office of Auxiliary (G-OCX)

- District/Director of Auxiliary (DIRAUX)

- Division

- Flotilla.

1.3 Style Conventions

This document uses the following specific type styles to differentiate commands, directory names, and so forth, from the main text.

ENTER The command to press the **ENTER** key is set in bold and uppercase.

F1 Function keys are set in bold and uppercase.

CTRL-D Key combinations, that is, keys that are pressed simultaneously to form a command, are hyphenated and set in bold and uppercase text.

ls$_\Delta$-lt Commands are set in **12 point Courier** bold text and in upper, lower, or mixed case as required by the system.

A pound sign represents sensitive data within a field.

$_\Delta$ Spaces, or blank characters, in commands are represented by a subscript triangle.

Variable data Variable data to be entered in response to a system prompt or as part of a command is set in italics and in upper, lower, or mixed case as required by the system. Example: **cp$_\Delta$/ax/*.pf/ax/*YYYY***.

*NOTE: Unless otherwise directed, press the **ENTER** key after typing a command within any procedure.*

1.4 Security and Privacy

Increased security has been added to the AUXDATA application. The ability to create, read, update, and delete data in the centralized system is based on the user's role and position. User IDs and passwords to the system indicate the allowable permission level that a user has and prevent users from performing any actions in AUXDATA that are beyond the scope of their level.

The USCG has migrated to a Web-based environment using the CG Standard Workstation III (SWIII). The new AUXDATA, which is a Solaris-Oracle-Internet Explorer application, is Web-based and runs on any workstation or laptop that supports the Microsoft (MS) Internet Explorer (IE) Web browser, which includes all SWIII computers. Architecturally, the AUXMIS II legacy system moved from a Computerized Tomography Operating System-based system to become AUXDATA in an MS Windows NT environment and has a completely different look and feel.

2. BUSINESS PROCEDURES

In the past, AUXMIS II business procedures mandated that users produce paper records and reports using local logs. Users were unable to view the data in the central database to determine if the CG Headquarters (HQ) AUXMIS II data clerk had entered their paper report correctly. The new functionality of AUXDATA changes some of the business procedures that were in place during the use of the AUXMIS II Legacy central computer system. Most notably, users enter their data into a log format directly in the AUXDATA central database, nearly eliminating mailing, faxing, or message traffic submission of quarterly reports.

2.1 Changes to Business Process

This section discusses many of the business process changes that have resulted with the use of AUXDATA.

2.1.1 Settings for AUXDATA

For AUXDATA to function, Regional System Managers must load the J-Initiator 1.1.7.18 plugin to MS IE. This version of J-Initiator is part of the CG Standard Image 4.6 and higher.

Also, Adobe Acrobat Reader must be configured properly to view reports. To configure Adobe Acrobat Reader, perform the steps below:

Step 1: Open Adobe Acrobat Reader.

Step 2: Click **File**.

Step 3: Point to **Preferences**, and click **General**.

Step 4: Ensure that **Web Browser Integration** is <u>not</u> selected (see Figure 2-1).
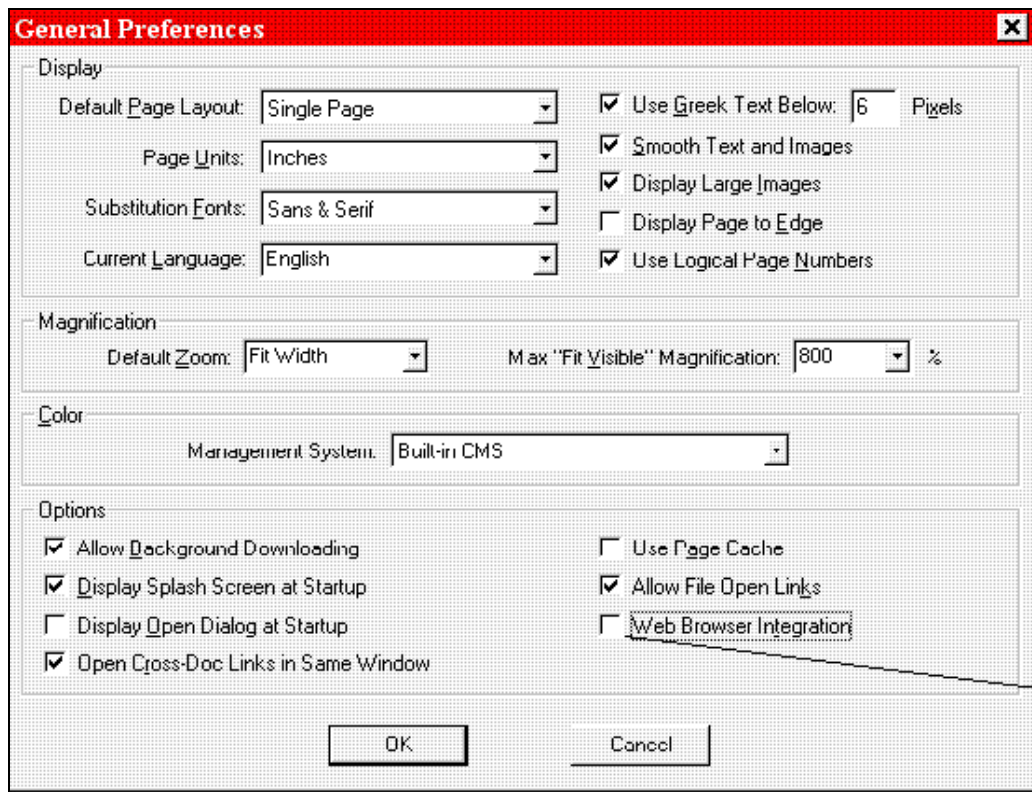
Figure 2-1 Clear Web Browser Integration Selection

2.1.2 Definition of a Resource

The old AUXMIS II Reporting system treated Aircraft, Boats, Radios, and Units as unique resources with very unique reporting requirements. AUXDATA has changed to manage each resource equally. Therefore, the data capture process is fundamentally the same regardless of the type of resource the user is reporting.

AUXDATA only captures resource hours, allowing the unit to report the performance of only one mission at any given time. Employment hours were determined by the CG to be unnecessary in justifying resource utilization, and therefore, were eliminated.

2.1.3 Activity Logs

AUXDATA uses a unique Activity Log for each Resource.

One of the major benefits of the common Activity Log structure is that the statuses of all CG Auxiliary resources can be determined at any time by generating a summary report of the last activity entry for all resources within an organizational structure such as a District or Flotilla. Once all users begin updating their logs in real time, there may no longer be a need to send a change in status message for individual resources.

New missions and employment categories have been incorporated in the new AUXDATA application, and some old employment categories have been omitted or changed.

2.1.4 Crew Participation in CG Auxiliary Missions

AUXDATA gives users the capability to assign crewmembers to the resource's activities. AUXDATA populates the CG unit's roster of personnel by pulling assignment data directly from the Coast Guard Human Resource Management System (CGHRMS). Pulling data directly from the same system that is used to assign Auxiliary members eliminates the need for unit users to maintain or create the basic information on CG members; the maintenance and creation is already done by Personnel Reporting Units. AUXDATA currently refreshes its rosters from CGHRMS once a week, so there is the possibility that a CG Auxiliary member who arrives at a unit one day after the roster refresh will not show up on their new unit's roster for six days. Since AUXDATA has the full listing of CG Auxiliarists, users can assign any one member, to an activity, regardless of whether the member is assigned to the unit.

2.1.5 Data Submission

In the past, information was gathered, placed in a report, and sent to DIRAUX in paper form on a regular basis. With AUXDATA, users are able to enter mission data daily into the database and all users are able to view the data as soon as it is entered. AUXDATA nearly eliminates the need for paper records and mailed reports.

Since data entered into AUXDATA is stored in a central database at the Operations Systems Center (OSC), there is no need to submit quarterly data. However, DIRAUX will need to verify the reported activities within their unit's resource logs using an approval process within AUXDATA. To eliminate the data entry and validation crunch at the end of the reporting period, AUXDATA activity data should be submitted into the database as soon as practical but no later than two weeks from when the activity took place.

3. AUXDATA FUNCTIONALITY

AUXDATA has its own built-in navigational tools, which include various menus and return links. **Do not** use your browser's **Back** and **Forward** buttons to navigate through AUXDATA. The menu items and the return links (when available) may be used at any time to navigate while logged on the system. Buttons represent all menu items and return links. When clicked with the mouse, they link to a new page or a previous part of the application.

The AUXDATA Main Menu is shown in Figure 3-1.
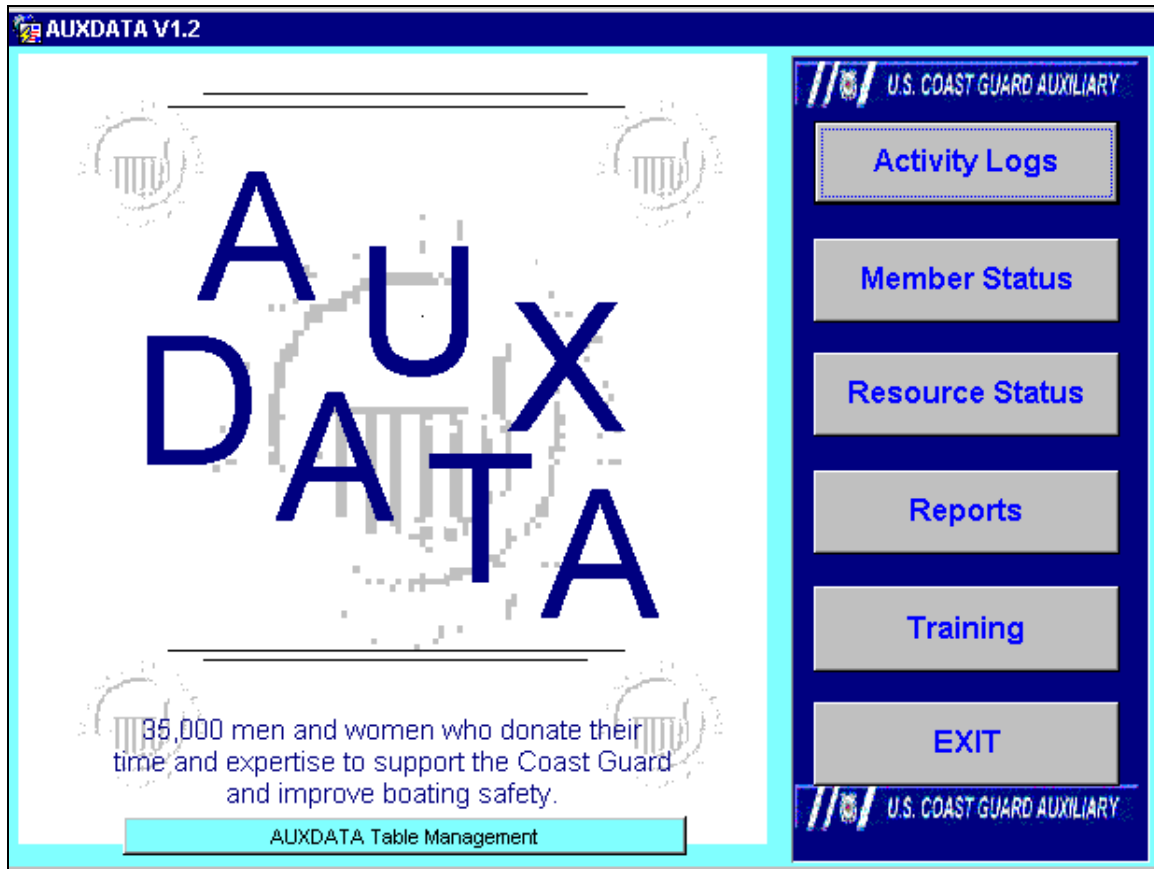
Figure 3-1 AUXDATA Main Menu

3.1 Main Menu Overview

Click any of the AUXDATA main menu options to use their capabilities. A general description of each mouse-activated menu option is listed below:

The **Activity Logs** button allows you to view, create, or modify the activity log class data for aircraft, boats, radios, and units. This feature also allows you to record the progress of task training for crewmembers. Activity approvals are performed through the **Activity Logs** button.

Member Status

The **Member Status** button allows you to record the status of members of your unit and any subordinate units.

Resource Status

The **Resource Status** button allows you to view, update, and insert information on the resources listed for your unit.

Reports

The **Reports** button allows you to run an AUXDATA report of your choice.

Training

The **Training** button links to the Training Management Tool (TMT) application.

EXIT

The **Exit** button logs off of the AUXDATA application.

AUXDATA Table Management

The AUXDATA Table Management button links to the Table Management System.

3.2 New Capabilities

AUXDATA has new capabilities, such as increased system security, ad hoc query/reporting, file downloading, and a graphical user interface (GUI).

AUXDATA provides functionality that is consistent with the AUXMIS II legacy system. AUXDATA, under a Sun Microsystems' Solaris platform, is a GUI application and uses MS Windows screen objects, such as drop-down menus, shortcut menus, command buttons, option buttons, and so forth.

3.3 Access to Information

The CG AUXDATA centralized database resides at the OSC. Through Web browsers, users may access the same central database, from any location with a user ID and password, to perform daily tasks. This central database is updated in real-time, meaning that the instant a user modifies or enters data in the system; all other users may view the current data.

3.4 Web Functions

As a Web-based system, AUXDATA requires certain data entry and procedural actions for the best results. This section and its subsections discuss some important tips to use when working with AUXDATA.

3.4.1 Date Field Formats

All days are to be treated as 24-hour days. Disregard the artificial effects of changing between Standard and Daylight Savings Time or crossing time zone boundaries. The Zulu offset must be adjusted before entering any dates into the system. When entering dates in AUXDATA, the following two date formats are used in different instances:

- **Date Only**: *ddmmmyyyy*, where *dd* is the two-digit day, *mmm* is the first three letters of the month, and *yyyy* is the year.

   For example, an event that occurs January 15, 2001 is entered as: **15JAN2001**

- **Date and Time**: *ddttttmmmyyyy* – Date Time Group (DTG) format, where *dd* is the two digit day, *tttt* is the time on a 24 hour clock, *mmm* is the first three letters of the month, and *yyyy* is the year.

   For example, an event that occurs January 15, 2001 at 1143 hours is entered as: **151143JAN2001**

Most of the AUXDATA reports allow users to enter a date into a date field by using a Calendar feature. To enter a date into a date field using the Calendar feature, perform the following steps:

Step 1: Click the [x] to the right of the date field.

   The Calendar appears similar to Figure 3-2.

Figure 3-2 Calendar Feature

Step 2: Use [<<] and [>>] buttons to select a year.

Step 3: Use [<] and [>] buttons to select a month.

Step 4: Click the day you wish to select, and click **OK**.

The Calendar is closed and the date selected appears in the date field.

3.4.2 Required Fields

AUXDATA contains many required fields, which represent the minimum amount of data that is necessary to enter a record in AUXDATA and may not be left blank. AUXDATA will not allow users to continue if a required field is left blank. Instead, an error will be received and you must enter the required data in the field in order to continue.

3.4.3 Queries and Searches

Any time you are prompted by AUXDATA to enter search criteria, the following options are available to you, depending on the information that you have and the results that you would like to retrieve:

- If you know exactly what item you are searching for, enter as much information as possible about that item.

  The unique item that matches your search criteria appears.

- If you know only a small piece of information (perhaps only a portion of a word) to enter as search criteria, enter that information in the appropriate field and use the percent symbol (%) as a wild card. For example, when searching for a particular crewmember that has a "ch" in the last name, you may enter: `%ch%`

  A list of every entry that matches your search criteria appears. For example, if you entered `%ch%`, every last name that includes "ch" appears.

- If you know the last letter or letters of the item you are searching for, enter this information preceded by a percent symbol (%). For example, when searching for a particular crewmember whose last name ends with "ch", you may enter: `%ch`

  A list of every entry that matches your search criteria appears. For example, if you entered `%ch`, every last name that ends with "ch" appears.

- If you know the first letter or letters of the item you are searching for, enter this information followed by a percent symbol (%). For example, when searching for a particular crewmember whose last name starts with "ch", you may enter: `ch%`

  A list of every entry that matches your search criteria appears. For example, if you entered `ch%`, every last name that begins with "ch" appears.

- If you do not know any information to enter as search criteria, leave all the search criteria fields blank and click the **Find** button at the bottom of the screen.

  *An entire listing of entries for your unit appears. If another query dialog box is displayed before the list appears, AUXDATA is giving you another chance to refine your search because the list will be large. Use any of these three options in the second box as well to refine your search or to retrieve the entire list. To display the entire list, ensure the percent symbol (%) is in the text box and click **OK**.*

3.4.4 Toolbar Options

A toolbar menu, which offers query and navigation tools, is available throughout the AUXDATA application (see Figure 3-3).
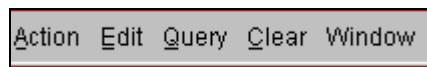
Figure 3-3 Toolbar Menu

The **Action** menu option offers the following commands:
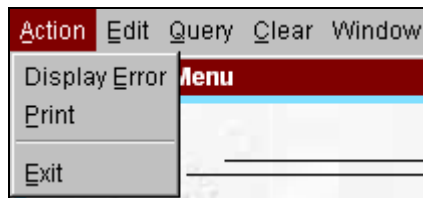
Figure 3-4 Action Menu

The **Edit** menu toolbar option offers the following commands:
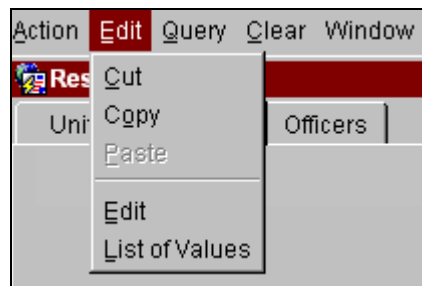
Figure 3-5 Edit Menu

The **Query** menu option offers the following commands:
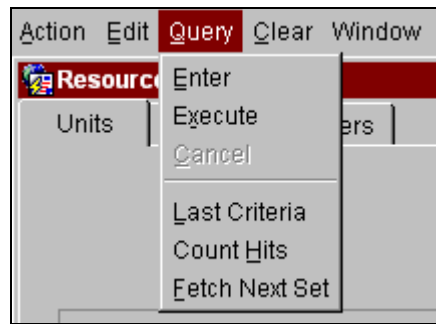
Figure 3-6 Query Menu

The **Clear** menu option offers the following commands:
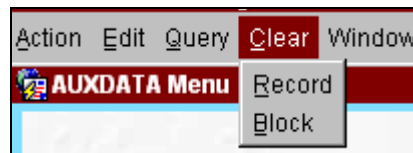
Figure 3-7 Clear Menu

The **Window** menu option offers the following commands:
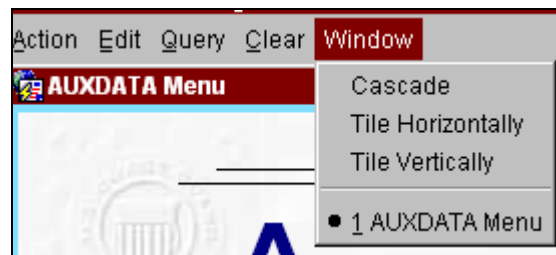
Figure 3-8 Window Menu

To execute a query for a data field, perform the following steps:

Step 1: Click the **Query** menu.

> *The Query command list appears.*

Step 2: Click **Enter**.

> *All data fields become blank.*

Step 3: Enter search parameters using the guidelines in *Section 3.4.3, Queries and Searches* for any and all data fields for which you wish to execute a query.

Step 4: Click the **Query** menu.

The Query command list appears.

Step 5: Click **Execute**.

All records that match the search parameters entered in Step 3 appear.

3.4.5 Lists of Values

When your cursor is placed in certain data fields, a `List of Values` message appears at the bottom of the window. This list may be accessed by pressing **CTRL-L** or by clicking the **List of Values** button. The List of Values dialog box appears similar to the one shown in Figure 3-9.
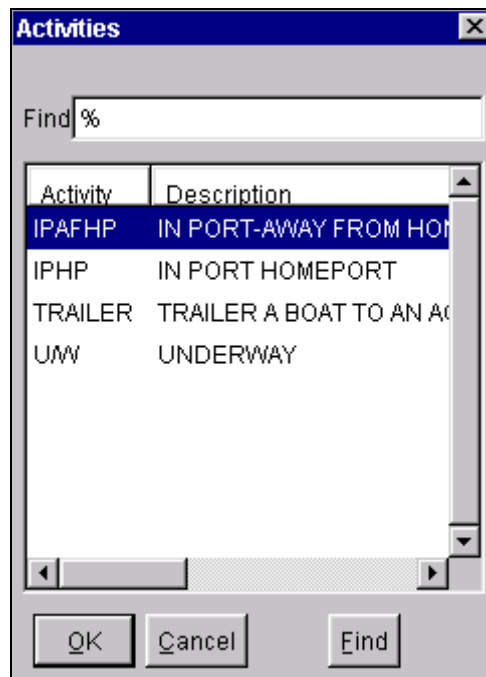
Figure 3-9 List of Values Dialog Box

You may refine your search further by entering text in the **Find** field using the guidelines in *Section 3.4.3, Queries and Searches* and clicking the **Find** button. After a successful search, select the items you wish to choose, and click **OK**.

The selected items are placed into the data field.

3.4.6 List Boxes

A list box is similar to a text box in AUXMIS but has an arrow on the right end of the box. Click the arrow on the right end of the list box to view a list of defined options. Data cannot be entered in lists; only selections from the available option list may be made. An example of a list box is shown in Figure 3-10.
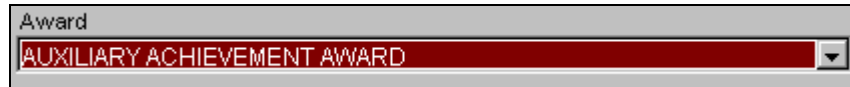
Figure 3-10 List Box

To use a list box, perform the following:

Step 1: To view the options, click the arrow ⯆ on the right end of the box.

The list of options appears on the screen as shown in Figure 3-11.
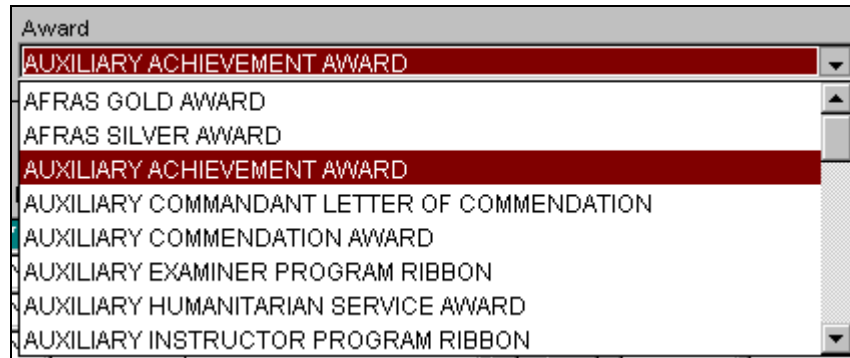
Figure 3-11 Option List

Step 2: Move the mouse to select the data.

The list closes and the data you selected appears in the list box.

3.4.7 Filters

A filtering feature is available throughout AUXDATA (see Figure 3-12 for an example), which allows you to quickly find a record(s) in a list.
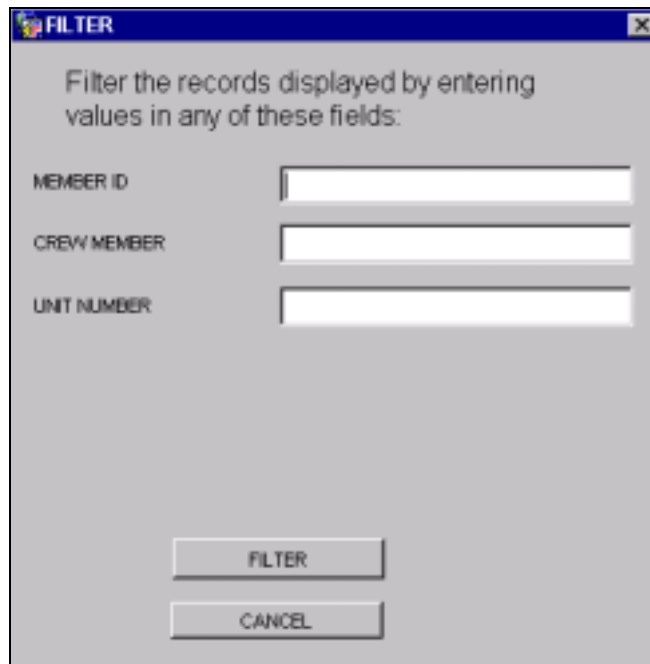
Figure 3-12 Filter

Perform the following to filter a list:

Step 1: Click the **Filter** button.

Step 2: In the dialog box that appears, enter a value in any one or all of the fields provided to filter the list.

Step 3: Click **Filter**.

The list is populated only with the records that have the specified value.

3.4.8 Column Heading Buttons

Sorting using the column headings buttons is available throughout the AUXDATA application (see Figure 3-13). These buttons list items alphabetically, numerically, or alphanumerically.
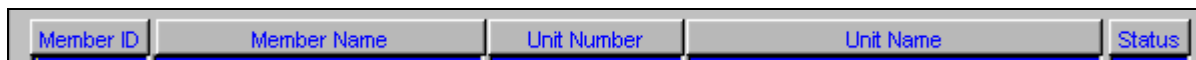
Figure 3-13 Column Heading Buttons

Step 1: To alphabetize using the Member Name, click the [Member Name] button.

Member Name lists the Members.

4. CONNECTING TO AUXDATA

This section discusses the necessary user names, passwords, associated access levels, and procedures to log on to AUXDATA.

4.1 Access Levels

NOTE: This user guide covers actions and procedures for all access levels. Not all users will have permissions to perform all the procedures in this guide. You should discern which procedures apply to your role, or class, in AUXDATA.

All authorized AUXDATA users have the ability to view all of the aircraft, boat, radio, and unit data in AUXDATA through the Reports menu. The ability to create, read, update, delete, and approve data in the system is based on the user's role, or class.

All users have unique identification numbers. Users' identification numbers are directly related to their assigned unit. Therefore, when users log on to AUXDATA, they will only see the resources assigned to their unit and may only update activity logs for resources assigned to their unit.

The following is a brief description of each of the three access levels:

- **Flotilla Level**

    Flotilla level users have access in AUXDATA to create and update log activities.

NOTE: No action can be performed on approved logs.

- **DIRAUX Level**

    DIRAUX may log on as Air, Boat, Radio, or Unit users. DIRAUX has access in AUXDATA to approve data at the command level by using **Approvals** and to create, update, and delete data in their unit's Activity Log.

- **Headquarters Level**

    Headquarters level users have access in AUXDATA to approve data at the HQ level.

4.2 Logging On To AUXDATA

AUXDATA is accessed through the Web browser on a Personal Computer (PC) or a CG SWIII. To access AUXDATA, perform the following steps:

Step 1: Log on to a PC or a CG SWIII.

Step 2: Open the MS IE browser by double-clicking the icon on your desktop.

The MS IE browser opens.

Step 3: In the **Address** bar of the browser, enter: **http://auxdata.uscg.gov** and press **ENTER**.

The AUXDATA Home page appears:

Figure 4-1 AUXDATA Home Page

> **WARNING: Only connect to Production for official business reasons; Production <u>may not</u> be used for training or practicing on the system. To train or practice on the system, connect to Training.**

Step 4: Scroll down the page and, using the links appropriate to your computer, click the **Training Database** hyperlink to connect to the development-training database, or click the **Production Database** hyperlink to connect to the production database, where official business is performed. Use the links for Jinitiator 1.1.8.16 if you are a Windows XP user using Microsoft Internet Explorer 6.0, and have a Pentium 4 processor.

A window appears similar to the following:

Figure 4-2 Log On Window

Step 5: Enter your *username* and *password* and click **Logon.** If you are a first time user, your user ID is your first initial followed by you last name. For example, John Smith's user ID would be **jsmith**. Your password is you user ID followed by underscore 1 (_1). Example: **jsmith_1**.

You are connected to AUXDATA, and the AUXDATA Main Menu appears similar to Figure 4-3.

Figure 4-3 AUXDATA Main Menu
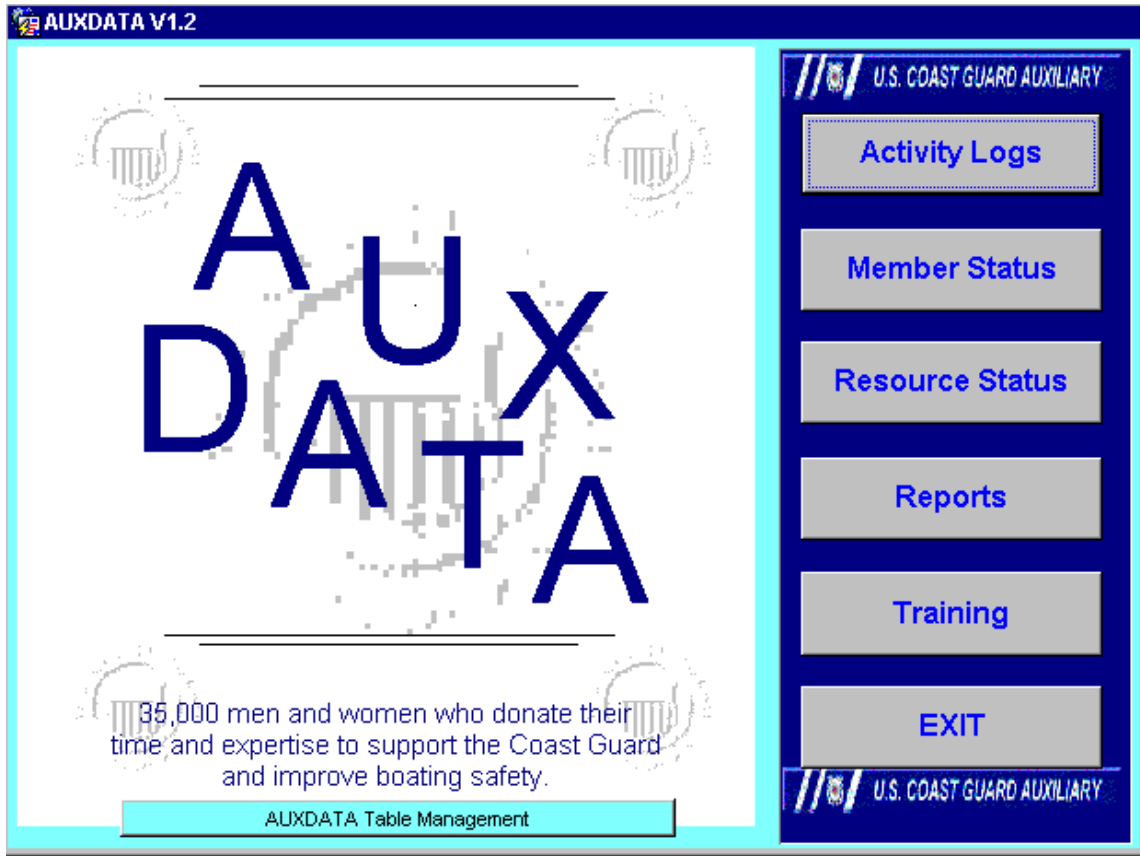
Step 6: Now that you are logged on the AUXDATA database through your browser, you may perform your Auxiliary duties. Continue to the next sections for guidance with various AUXDATA tasks.

4.3 Changing Your Password

Step 1: Log on to a PC or a CG SWIII.

Step 2: Open the MS IE browser by double-clicking the [icon] icon on your desktop.

The MS IE browser opens.

Step 3: In the **Address** bar of the browser, enter: `http://auxdata.uscg.gov` and press **ENTER**.

The AUXDATA Logon Screen appears.

Step 4: Enter your *username* and *password*, select the **Change Password** check box, and then click **Logon**.

The Change Password screen appears similar to Figure 4-4:
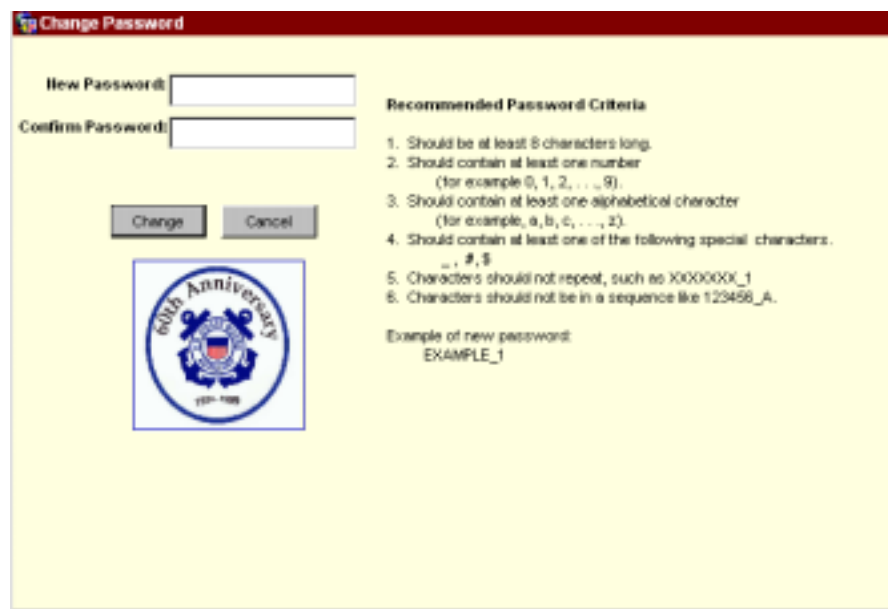
Figure 4-4 Change Password Screen

NOTE: It is highly recommended for security purposes that you adhere to the Recommended Password Criteria listed on the Password Change screen.

Step 5: Enter a new password in the **New Password** field, then re-enter the new password in the **Confirm Password** field. Click **Change**.

A window appears similar to the following:

Figure 4-5 Dialog Box

Step 6: Click **OK**.

Your password is changed. The user is logged on and the AUXDATA Main Menu appears.

5. ACTIVITY LOGS

The Activity Logs portion of AUXDATA is the most important and most widely used portion of the system. In the Activity Logs, you must keep a continuous log of activities for a specific aircraft, boat, cutter, or radio by entering activities each time your mission status changes. AUXDATA computes and produces all numbers and reports for you when it is time to run a report, which obviates the need for calculating the numbers yourself. AUXDATA allows you to enter your activities at any time (immediately after the activity, incrementally, or all at once), but you are responsible for ensuring that the business procedures defined in *Section 2, Business Procedures*, are followed. The Activity Logs provides the following options:

- Aircraft

- Boat (including cutter boats)

- Radio

- Unit.

Refer to *Appendix A, Activity Logs Button Flow Charts,* for examples of inserting the following activities: ATON Patrol (Boat), Public Education (PE), Radio Mission – Marine Patrol (Radio), Safety Patrol (Boat), and Vessel Safety Check (VSC).

To use the Activity Logs, perform the steps in this section and subsections.

NOTE: *For the purpose of this user guide, the procedures and examples provided below are based on the Boat option. Aircraft, Boats, Radios, and Units have similar actions, but details, such as list items and resources, vary with each.*

5.1 Create Activity

To create an activity for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the **Activity Logs** button from the AUXDATA Main Menu.

The Boat Resources screen appears similar to the following:

Figure 5-1 Boat Resource Screen

Step 2: Click the desired resource. Click the desired unit. Click the **Activity Logs** tab.

The Activity Logs screen appears similar to the following:

Figure 5-2 Activity Logs Screen

Step 3: Click [Create Activity] button.

The cursor moves to the next available activity line and the screen has a new button.

Step 4: Enter the necessary information for the activity. Press the **TAB** key after each field. Use the **List of Values** button when necessary.

The information is entered.

Step 5: Click **Save**.

The information for the activity is saved.

5.2 Copy Activity

To copy an activity for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the activity log with Mission desired. Click the [Copy Activity] button.

*The activity is copied to the next available blank activity log. All information except the **Start Date Local** field is copied.*

Step 2: Enter the Start Date Local in the **Start Date Local** field and press the **TAB** key. Click **Save**.

> *The activity is entered and saved.*

5.3 Copy Activity with Crew

To copy an activity with the crewmembers for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the activity in Approved Activities with Mission desired. Click | Copy w/Crew | .

> *The activity is copied to the next available blank activity log. All information except the **Start Date Local** field is copied.*

Step 2: Enter the Start Date Local in the **Start Date Local** field and press the **TAB** key. Click **Save**.

> *The information is entered and saved.*

5.4 Cancel Insert

To cancel the insertion of an activity for your resource (aircraft, boat, radio, or unit), perform the following step:

Step 1: Click the | Cancel Insert | button.

> *The Activity is cancelled and the cursor moves to the previous activity.*

5.5 Entering Activity Log Details for Resources

To enter the activity log details for your resource (aircraft, boat, or radio), perform the following steps:

Step 1: Click the first activity log entered (For example: Mission=ATON). Click the **Activity Log Details** tab.

The Activity Log Details screen appears similar to the following:

Figure 5-3 Activity Log Details Screen

Step 2: Enter the information required for Mission, SAR, or ATON details, whichever applies to the present mission. (Use the **List of Values** button when necessary.)

The information is entered.

Step 3: Click **Save**.

The information is saved.

5.6 Entering Activity Log Details for Unit

To enter the activity log details for your unit, perform the following steps:

Step 1: Click the first activity log entered (For example: Mission=VSC). Click the **Activity Log Details** tab.

The Activity Log Details screen appears similar to the following:

Figure 5-4 Activity Logs Details Screen

Step 2: Enter the information required, whichever applies to the present mission. Use the **List of Values** button when necessary.

The information is entered.

Step 3: Click **Save**.

The information is saved.

5.7 Entering Crew Assignments

The Crew Assignments tab allows you to search on the following: Your Unit and Its Subordinate Unit, Select CG Unit, and Search for Person. To enter the crew assignments for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the **Crew Assignments** tab.

The Crew Assignments screen appears similar to the following:

Figure 5-5 Crew Assignments Screen

Step 2: Click [>>] to assign all of the crewmembers. If not all crewmembers participated, select the crewmembers you wish to assign and then click [>]. If needed, use the **Filter** feature to refine the list of crewmembers displayed.

The crewmembers or crewmember selected are moved from the left side of the screen to the right side of the screen.

Step 3: For each member listed on the right side, there is a position. Use the list box to select each member position.

Step 4: Click **Save**.

The information is saved.

5.8 Entering Tasks Tab

To enter the tasks for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the **Tasks** tab.

The Tasks screen appears similar to the following:

Figure 5-6 Tasks Screen

Step 2: Click the **Include** check boxes for the Tasks desired.

5.9 Entering Task Capture

The Task Capture tab allows you to delete, copy, and save tasks in which your resource is participating. To capture the tasks for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the **Task Capture** tab.

The Task Capture Screen appears similar to the following:

Figure 5-7 Task Capture Screen

Step 2: Enter the information, for example: **Short title, name of Instructor, Duration in hours, Date Completed, and Remarks**, for the task to be captured.

Step 3: Click **Save**.

The information is saved.

5.10 Entering Approvals

Up to three months of Approved Activities are available for viewing. To approve the activities for your resource (aircraft, boat, radio, or unit), perform the following steps:

Step 1: Click the **Approvals** tab.

The Approvals screen appears similar to the following:

Figure 5-8 Approvals Screen

Step 2: Select the desired activity in Unapproved Activities. Click ⬚ up ⬚.

The activity is highlighted. A message appears, similar to the following:

```
You are about to transfer this facility to another unit.  Continue?
```

Step 3: Click **Confirm**.

Step 4: Click the **List of Values** button. Click the unit desired. Click **OK**.

Step 5: Click **Transfer**.

The resource is transferred. A message appears confirming the transfer.

Step 6: Click **OK**.

The Resource screen appears.

6. DISESTABLISH A UNIT

AUXDATA allows you to disestablish a unit and a subordinate unit. Perform the following steps to disestablish a unit:

Step 1: Click the unit desired to disestablish. Click **Update**.

> *The Unit Update screen appears.*

Step 2: In the **Disestablish Date** field, enter the date the unit is to be disestablished and press the **TAB** key. Click **Save**.

> *A Unit Transfer screen appears, similar to the following:*

Figure 6-1 Unit Transfer Screen

Step 3: Click **List of Values**. Select the unit to be transferred. Click **OK**.

> *The Unit Number and Name entered appear.*

Step 4: Click **Save**.

> *A confirmation message appears.*

Step 5: Click **OK**.

> *The Unit Update screen appears.*

7. MEMBER STATUS

AUXDATA allows you to record the status of members of your unit and any subordinate units. To record a unit's personnel status, perform the following steps:

Step 1: Click the **Member Status** button from the AUXDATA Main Menu.

A list of the crewmembers assigned to your unit and subordinate units appear similar to the following:

Figure 7-1 Member Status Unit Screen

*NOTE: The **Menu** button allows you to return to the AUXDATA Main Menu.*

Step 2: Select the unit or subordinate unit desired. Click the **Member** tab.

The Member Screen appears similar to the following:

Figure 7-2 Member Screen

NOTE: The **Active** and **Inactive** option buttons allow you to view Active or Inactive members.

7.1 Change Member Status

AUXDATA allows you to change the status of the members in your unit and your subordinate units by performing the following steps:

Step 1: Click the [**Member Status**] button from the AUXDATA Main Menu.

Step 2: Click the **Change Status** button.

The Change Status Screen appears similar to the following:

Figure 7-3 Change Status Screen

Step 3: Click the **Current Status** list box, and then select the status desired. In the **New Status Date** box, enter the date desired. Press the **TAB** key.

The information is entered.

Step 4: Click **Save**.

A confirmation message appears.

Step 5: Click **OK**.

The Member Selection screen appears and the member status is changed.

7.2 Insert Member

AUXDATA allows you to insert a new member in your unit and your subordinate units by performing the following steps:

Step 1: Click the [**Member Status**] button from the AUXDATA Main Menu.

Step 2: Select the unit or subordinate unit desired. Click the **Member** tab.

> *The Member Screen appears.*

Step 3: Click the **Insert** button.

> *The Insert Screen appears similar to the following:*

Figure 7-4 Member Insert Screen

Step 3: Enter the necessary information for the member. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** button and list box when necessary.)

Step 4: Click **Save**.

> *The record is saved.*

7.3 Update Member

AUXDATA allows you to update members in your unit and your subordinate units by performing the following steps:

Step 1: Click the ▢ **Member Status** button from the AUXDATA Main Menu.

Step 2: Select the unit or subordinate unit desired. Click the **Member** tab.

The Member Screen appears.

Step 3: Select the member to be updated. Click the **Update** button.

The Update Screen appears similar to the following:

Figure 7-5 Member Update Screen

Step 4: Make the changes to the member's information.

Step 5: Click **Save**.

The information is saved.

Step 6: Click the **Menu** button.

The Unit Selection screen appears.

7.4 Transfer a Member

AUXDATA allows you to transfer members of your units and your subordinate units to other units by performing the following steps:

Step 1: Click the **Member Status** button from the AUXDATA Main Menu.

Step 2: Select the unit or subordinate unit desired. Click the **Member** tab.

       The Member Screen appears.

Step 3: Select the member you wish to transfer. Click the **Update** button.

       The Member Update screen appears.

Step 4: Click the **Transfer** button.

       The Member Transfer screen appears similar to the following, displaying the member to be transferred:

Figure 7-6 Member Transfer Screen

Step 5: Click the **List of Values** button for the Unit Name. Scroll down and select the unit desired. Click **OK**. Press the **TAB** key.

       The information is entered.

Step 6: Click **Save**.

> *A confirmation message appears.*

Step 7: Click **OK**.

> *The Member Information screen appears with the new unit listed for the member.*

7.5 Awards

AUXDATA allows you to grant awards to members of your unit and your subordinate units by performing the following steps:

Step 1: Click the | **Member Status** | button from the AUXDATA Main Menu.

Step 2: Select the unit or subordinate unit desired. Click the **Member** tab.

> *The Member Screen appears.*

Step 3: Select the unit desired. Click the **Awards** tab.

> *The Awards Information Screen appears similar to the following:*

Figure 7-7 Awards Information Screen

Step 4: From the Award list box, select the award you wish to grant. Press the **TAB** key. Enter date of the award in the **Award Date** field.

Step 5: Click [>>] to move all of the crewmembers to receive the award. Select the eligible crewmember to receive the award and click [>].

> *The crewmembers or crewmember is moved from **Eligible to Receive Award** to **Awardees**.*

8. RESOURCE STATUS

AUXDATA allows you update, insert, save units, facilities, and officers of your units and your subordinate units. This section provides instructions for using the Resource Status button. Perform the following steps to access the Resource Status feature:

Step 1: Click the **Resource Status** button from the AUXDATA Main Menu.

The Unit Selection Screen appears similar to the following:

Figure 8-1 Unit Selection Screen

8.1 Insert Unit

Perform the following steps to insert a unit:

Step 1: Click the [Resource Status] button from the AUXDATA Main Menu.

The Unit Selection Screen appears.

Step 2: Click the [Insert] button.

The Unit Insert Screen appears similar to the following:

Figure 8-2 Unit Insert Screen

Step 3: Enter the necessary information for the unit. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** button and list boxs when necessary.) Click **Save**.

The information is entered and saved.

8.2 Update a Unit

Perform the following steps to update a unit:

Step 1: Click the **Resource Status** button from the AUXDATA Main Menu.

The Unit Selection Screen appears.

Step 2: Select the unit to be updated. Click the **Update** button.

The Unit Update screen displaying information for the selected unit appears, similar to the following:
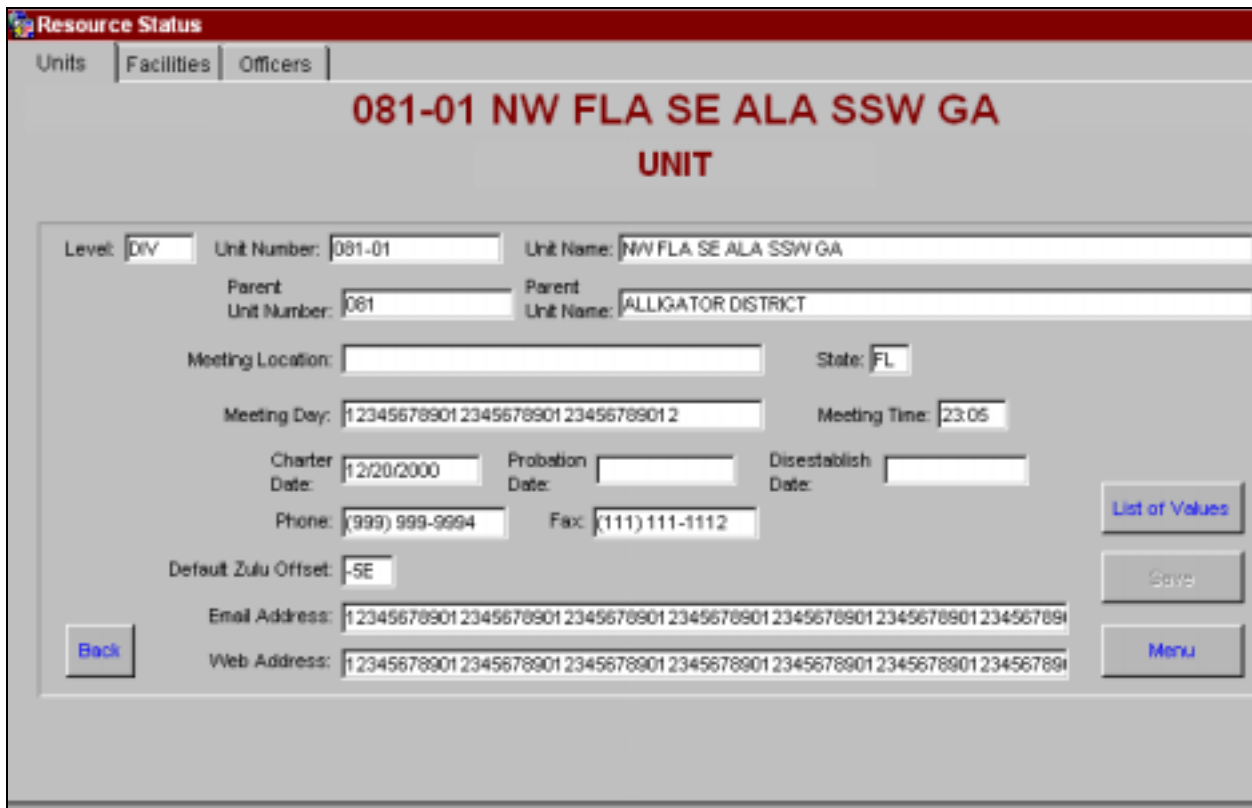
Figure 8-3 Unit Update Screen

Step 3: Enter and/or modify the information appropriately. Click **Save**.

The information is entered and saved.

8.3 Insert a Facility

The Facilities tab allows you to insert and update operational facilities for your units and subordinate units. Perform the following steps to insert a facility:
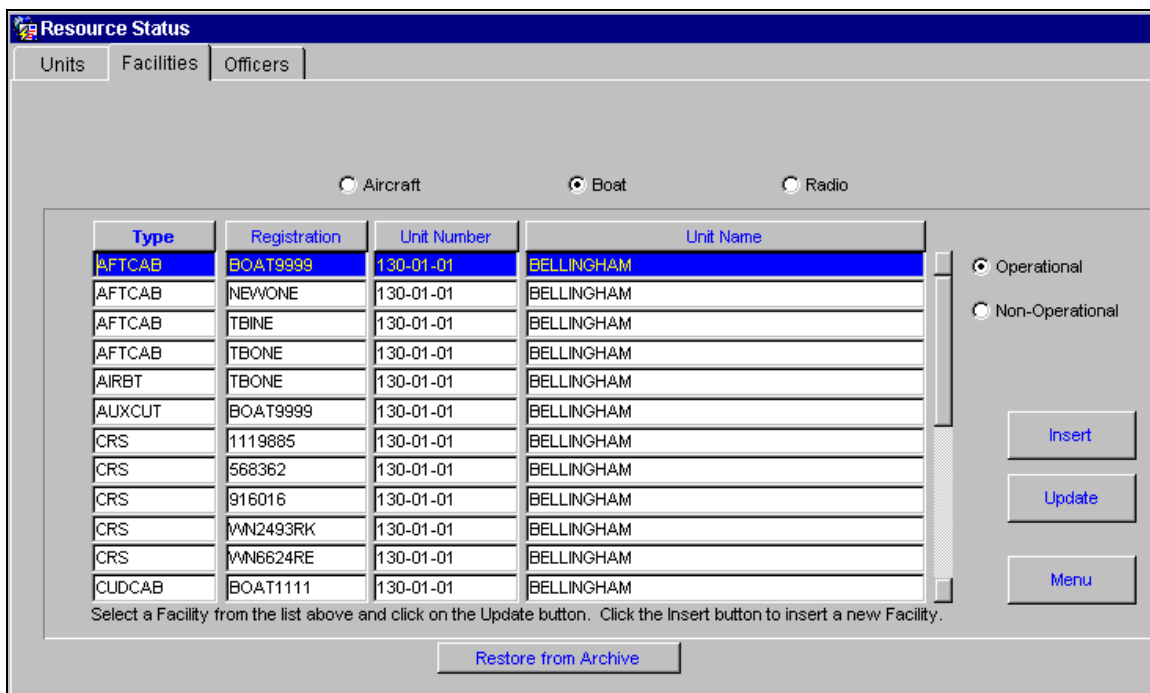
Step 1: Click the [Resource Status] button from the AUXDATA Main Menu.

The Unit Selection Screen appears.

Step 2: Select the unit desired. Click the **Facilities** tab.

The Facilities screen appears, similar to the following:

Figure 8-4 Facilities Screen

Step 3: Select the facility you wish to insert, for example, a boat, aircraft, or radio. Click the

Insert button.

The Facility Insert screen appears similar to the following:

Figure 8-5 Facility Insert Screen

Step 4: Enter the required information. Click **Save**.

The information is entered and saved.

Step 5: Click the **Boat Information** button.

The Boat Information screen appears, similar to the following:

Figure 8-6 Boat Information Screen

Step 6: Enter the necessary information for the boat. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** button and list boxes when necessary. Click **Save**.

The information is entered and saved.

Step 7: Click the **Details** button.

The Boat Details screen appears, similar to the following:

Figure 8-7 Boat Details Screen

Step 8: Enter the necessary information for the facility. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** button and list boxes when necessary. Click **Save**.

The information is entered and saved.

8.4 Update a Facility

Perform the following steps to update a facility:

Step 1: Click the **Resource Status** button from the AUXDATA Main Menu.

> *The Unit Selection screen appears.*

Step 2: Select the unit desired on the Units screen. Click the **Facilities** tab.

> *The Facilities screen appears.*

Step 3: Select the desired facility to be updated, for example, a boat, aircraft, or radio. Click the **Update** button.

> *The Boat Update screen appears.*

Step 4: Modify appropriate fields. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** button and list boxes when necessary.) Click **Save**.

> *The information is entered and saved.*

Step 5: Click the **Ownership** button.

> *The Ownership screen appears, similar to the following:*

Figure 8-8 Ownership Screen

Step 6: Modify appropriate fields. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** button and list boxes when necessary. Click **Save**.

> *The information is entered and saved.*

8.5 Officers Tab
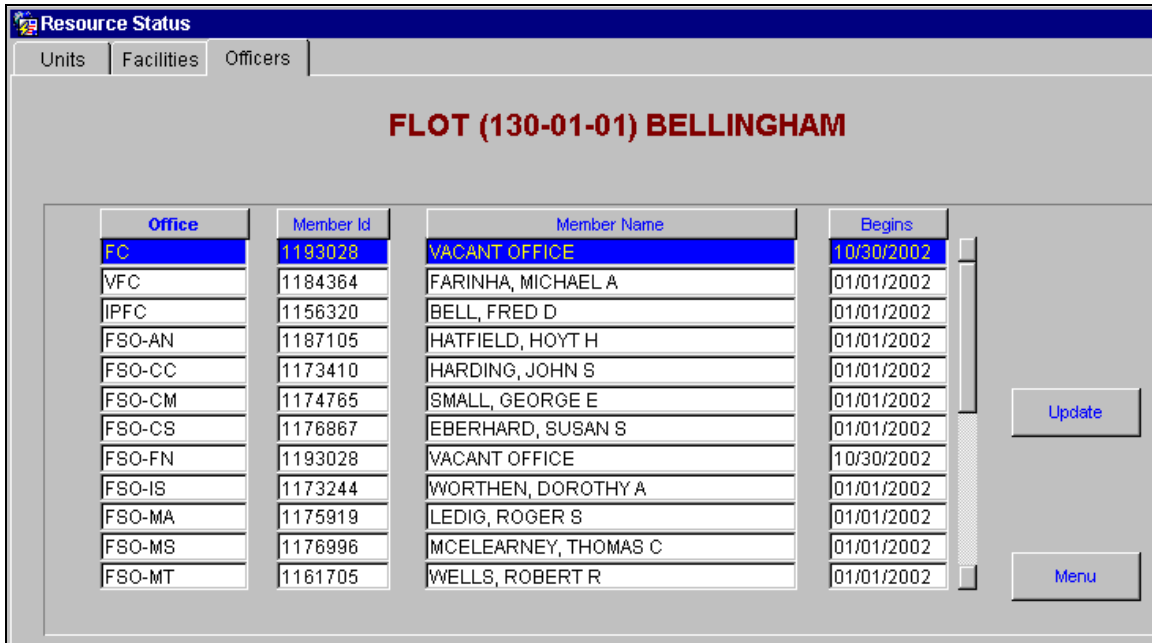
The Officers tab allows you to update officers for your unit and subordinate units. Perform the following steps to update an officer(s):

Step 1: Click the [Resource Status] button from the AUXDATA Main Menu.

> *The Unit Selection Screen appears.*

Step 2: Select the desired unit. Click the **Officers** tab.

> *The Officers screen appears, similar to the following:*

Office	Member Id	Member Name	Begins	
FC	1193028	VACANT OFFICE	10/30/2002	
VFC	1184364	FARINHA, MICHAEL A	01/01/2002	
IPFC	1156320	BELL, FRED D	01/01/2002	
FSO-AN	1187105	HATFIELD, HOYT H	01/01/2002	
FSO-CC	1173410	HARDING, JOHN S	01/01/2002	
FSO-CM	1174765	SMALL, GEORGE E	01/01/2002	Update
FSO-CS	1176867	EBERHARD, SUSAN S	01/01/2002	
FSO-FN	1193028	VACANT OFFICE	10/30/2002	
FSO-IS	1173244	WORTHEN, DOROTHY A	01/01/2002	
FSO-MA	1175919	LEDIG, ROGER S	01/01/2002	
FSO-MS	1176996	MCELEARNEY, THOMAS C	01/01/2002	
FSO-MT	1161705	WELLS, ROBERT R	01/01/2002	Menu

Figure 8-9 Officers Screen

Step 3: Select the Office to be updated. Click **Update**.

The Officers Update screen displaying information for the selected Office appears, similar to the following:

Figure 8-10 Officers Update Screen

Step 4: Modify appropriate fields. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** button and list boxes when necessary. Click **Save**.

The Officers Information screen appears. The Officer has been updated.

9. REPORTS

AUXDATA allows you to run the following types of reports: Activity Logs, Abstract, Chain of Command, Crew Underway Time, Resources By Flotilla, Operations, E-mail Directory, Member Roster, Member Anniversary Status, Log Activity Summary, Activity By State, Sail List Detail, Daily Sail List, Underway Resource Hours, Days Underway, Underway Activity and Crew, Underway Crew, Address and Flotilla Data, and Unit Summary Data. This section provides instructions for using the Reports button. These reports are generated in the following two formats: **.pdf** & **.csv**.

For instructions on printing reports when connected through the CITRIX Server refer to *Appendix B, Printing Reports Through the CITRIX Server*.

Perform the following step to access the Reports feature:

Step 1: Click the [REPORTS] button.

The Reports menu appears, similar to the following:
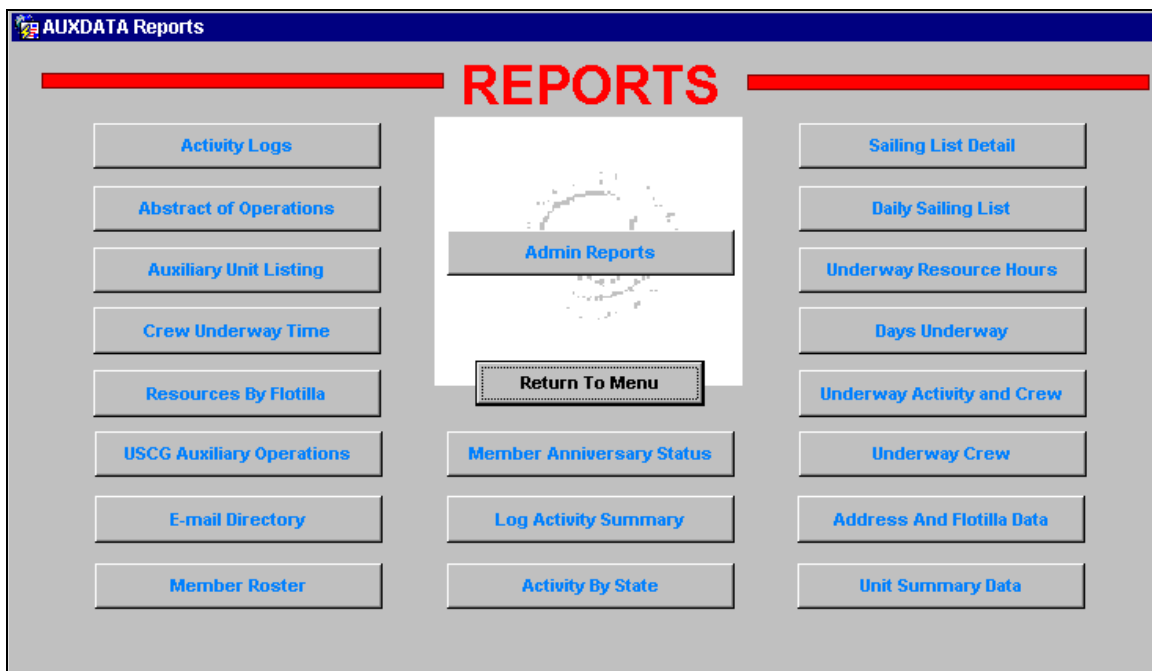
Figure 9-1 AUXDATA Reports Menu

9.1 Activity Logs
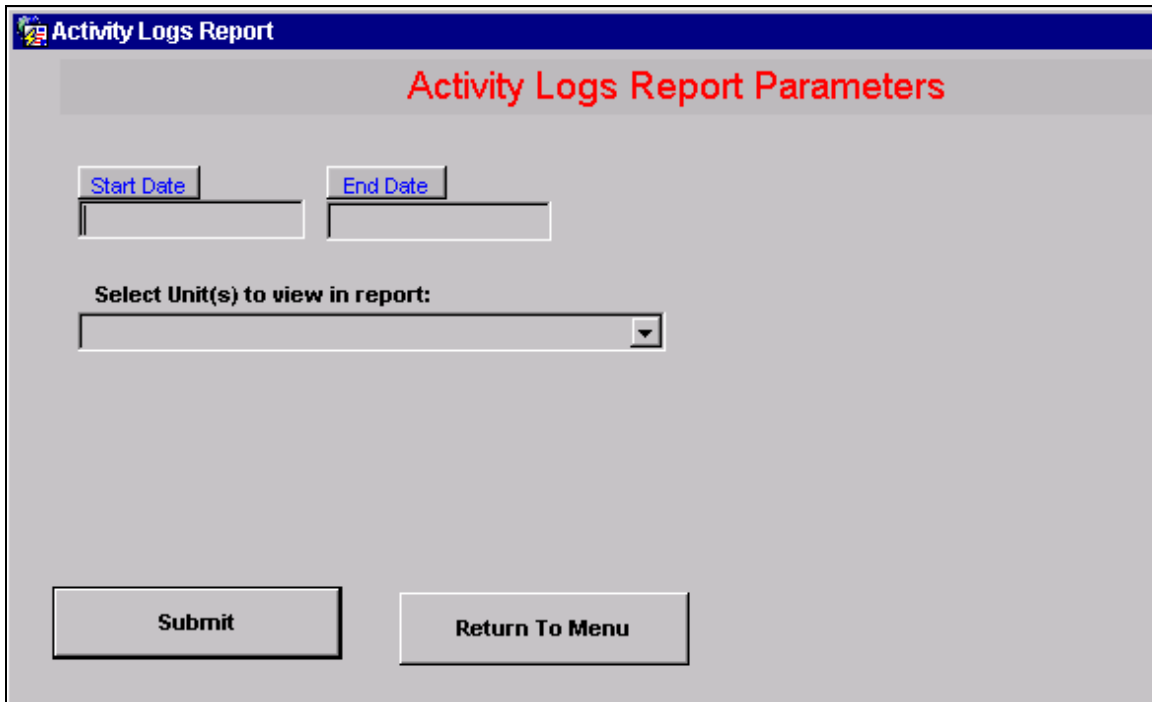
The **Activity Logs** button allows you to run a report on Activity Logs from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an activity log report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

> *The AUXDATA Reports menu appears.*

Step 2: Click the [Activity Logs] button.

> *The Activity Logs Report Parameters screen appears, similar to the following:*

Figure 9-2 Activity Logs Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Activity Logs Report screen appears, similar to the following:

Figure 9-3 Activity Logs Report Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.2 Abstract of Operations
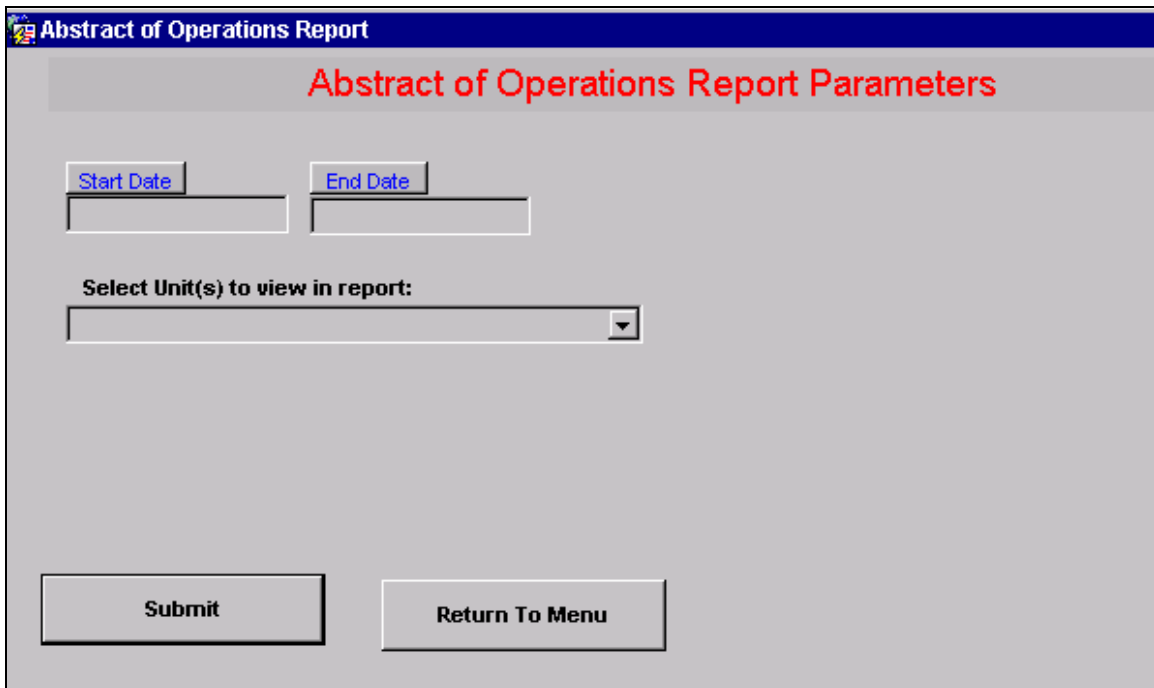
The **Abstract of Operations** button allows you to run a report on Abstract of Operations from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an abstract report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

> *The AUXDATA Reports menu appears.*

Step 2: Click the [Abstract of Operations] button.

> *The Abstract of Operations Report Parameters screen appears, similar to the following:*

Figure 9-4 Abstract of Operations Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Activity Logs screen appears, similar to the following:

Figure 9-5 Abstract of Operations Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.3 Auxiliary Unit Listing

The **Auxiliary Unit Listing** button allows you to run a report on the Auxiliary Unit Listing. Perform the following steps to run an Auxiliary Unit Listing report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

> *The AUXDATA Reports menu appears.*

Step 2: Click the [Auxiliary Unit Listing] button.

> *The Auxiliary Unit Listing Screen appears similar to the following:*

Parent Unit:	AUXILIARY NATIONAL UNIT	Unit Number:	0
Unit Name:		**Unit Number:**	
FIRST DISTRICT NORTHERN REGION		013	
FIRST SOUTHERN		014	
FIFTH NORTHERN		053	
FIFTH SOUTHERN		054	
SEVENTH DISTRICT		070	
EIGHTH DISTRICT - COASTAL		081	
EIGHTH DISTRICT - EASTERN		082	
EIGHTH DISTRICT - WESTERN		085	

Figure 9-6 Auxiliary Unit Listing Screen

Step 3: Click the **X** in the upper right-hand corner.

> *The window closes and the AUXDATA Reports menu appears.*

9.4 Crew Underway Time
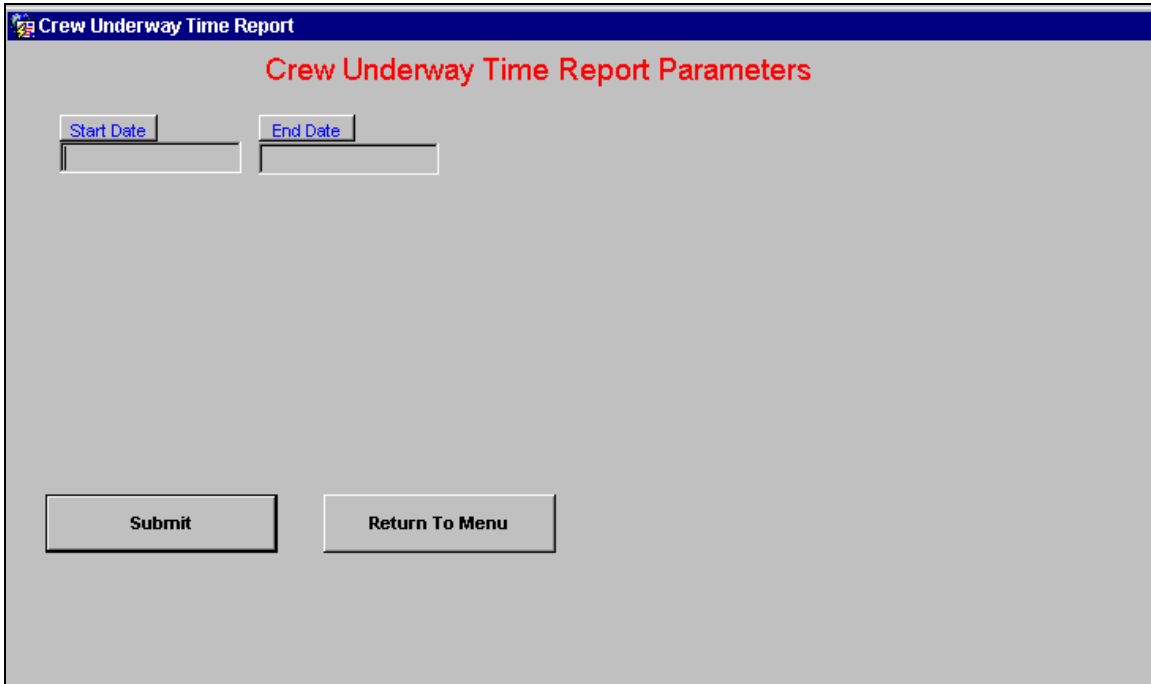
The **Crew Underway Time** button allows you to run a report on the crew hours from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run a Crew Underway Time report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

>   *The AUXDATA Reports menu appears.*

Step 2: Click the [Crew Underway Time] button.

>   *The Crew Underway Time Report Parameters appears, similar to the following:*

Figure 9-7 Crew Underway Time Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Crew Underway Time screen appears, similar to the following:

Crew Underway Time

HAYDEN ISLAND AND ALL SUB-UNITS

Reporting Period: 01-DEC-2001   Through: 02-DEC-2002

Days in Period: 367   Hours in Period: 8808

Hull Number:	OR487AAA		Unit Number:	130-07-06		
Crewmember			Emp ID	Unit	Mission Count	U/W Hours
ANTANAVICH,JOSEPH F			1144341	013-03-03	1	4,148.00
ANDERSON,KENNETH T			1174174	130-07-06	2	4,172.00
ADAMS,WILLIAM D			1176248	130-08-02	1	24.00
ADAMS,DAVID L			1168878	130-11-01	1	24.00
		OR487AAA's Totals			5	8,368.00
Hull Number:	T2		Unit Number:	130-07-06		
Crewmember			Emp ID	Unit	Mission Count	U/W Hours
ANDERSON,KENNETH T			1174174	130-07-06	2	14.00
		T2's Totals			2	14.00

Figure 9-8 Crew Underway Time Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.5 Resources By Flotilla

The **Resources By Flotilla** button allows you to run a report on Resources By Flotilla. Perform the following steps to run a Resources By Flotilla report:

Step 1: From the AUXDATA Main Menu, click the **REPORTS** button.

The AUXDATA Reports menu appears.

Step 2: Click the [Resources By Flotilla] button.

The Resources By Flotilla Report Parameters screen appears, similar to the following:
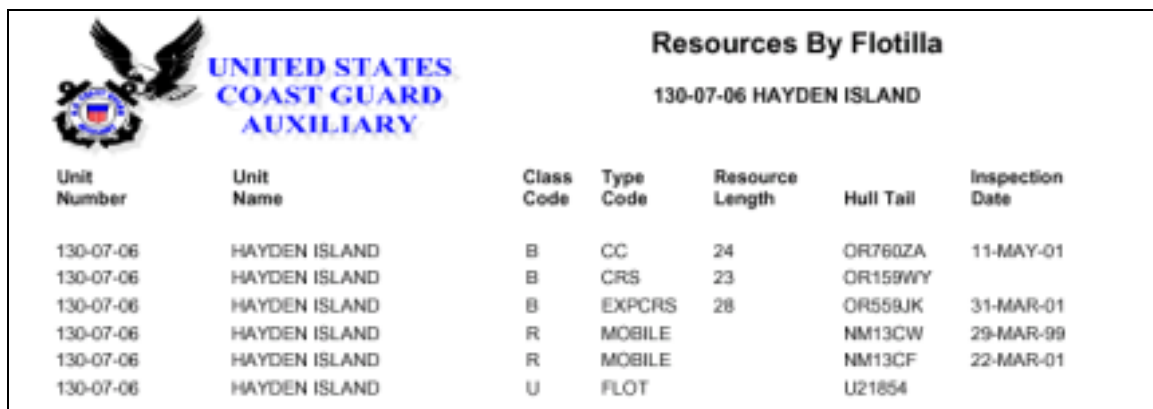
Figure 9-9 Resources By Flotilla Report Parameters Screen

Step 3: Select the unit to view in report. Click **Submit**.

The Resources By Flotilla screen appears, similar to the following:

Figure 9-10 Resources By Flotilla Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.6 USCG Auxiliary Operations

The **USCG Auxiliary Operations** button allows you to run a report on USCG Auxiliary Operations and Return to the Main Menu. Perform the following steps to run an USCG Auxiliary Operations report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [USCG Auxiliary Operations] button.

The USCG Auxiliary Operations Report Parameters screen appears, similar to the following:

Figure 9-11 USCG Auxiliary Operations Report Parameters Screen

Step 3: Select one of the following option buttons: **All**, **Inactive**, or **Active**. Click **Submit**.

The USCG Auxiliary Operations screen appears, similar to the following:

Figure 9-12 USCG Auxiliary Operations Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.7 E-mail Directory

The **E-mail Directory** button allows you to run a report on the E-mail Directory by unit and return to the Main Menu. Perform the following steps to run an E-mail Directory report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [E-mail Directory] button.

The Email Directory Report Parameters screen appears, similar to the following:
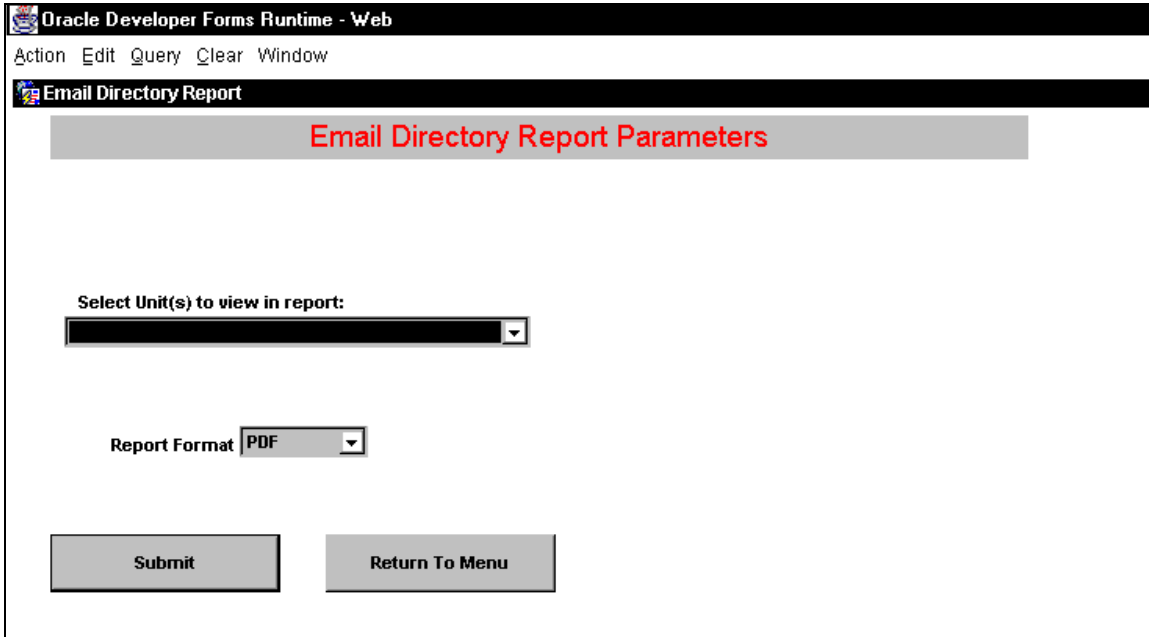
Figure 9-13 Email Directory Report Parameters Screen

Step 3: Click the arrow for the list box. Select the desired unit.

The unit appears in the box.

Step 4: Click **Submit**.

The E-mail Directory screen appears, similar to the following:

E-mail Directory

130-07-06 HAYDEN ISLAND

Unit Number	Member No.	Member	Email 1	Email 2
130-07-06	1174174	ANDERSON, KENNETH T	KANDERSON@HOTMAIL.COM	ANDERSONK@OSC.USCG.MIL
130-07-06	1174173	BALL, MAX E		
130-07-06	1183318	BALL, ROSE M		
130-07-06	1174746	BLACKFORD, SHEILA A	SHIELA_BLACKFORD@YAHOO.COM	
130-07-06	1174099	BURNS, EDWIN M	EDBURNS@GTE.NET	
130-07-06	1164038	CASE, MICHAEL T		
130-07-06	1173983	DICKIE, GEORGE L JR		
130-07-06	1190264	DOERFLER, GEOFF M	GDOERFLER@AOL.COM	
130-07-06	1158374	FOLLOWELL, TERESA A		
130-07-06	1142987	GUAY, PAUL D		
130-07-06	1174109	GULBRANDSON, DANIEL C		
130-07-06	1159774	HANSON, FRANCES L		
130-07-06	1174035	HANSON, STEPHEN N		
130-07-06	1183301	HEVY, ARTHUR D		
130-07-06	1183448	HEVY, CATHY A		
130-07-06	1183443	JAMES, NEIL H	NHJAMES@HOME.COM	
130-07-06	1183439	KELLY, MARY A		
130-07-06	1173859	KELLY, TIMOTHY J	OLDSALT068@MSN.COM	

Figure 9-14 E-mail Directory Screen

Step 5: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.8 Member Roster

The **Member Roster** button allows you to run a report on the Member Roster by unit and Return to the Main Menu. Perform the following steps to run an E-mail Directory report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Member Roster] button.

The Member Roster Report Parameters screen appears, similar to the following:
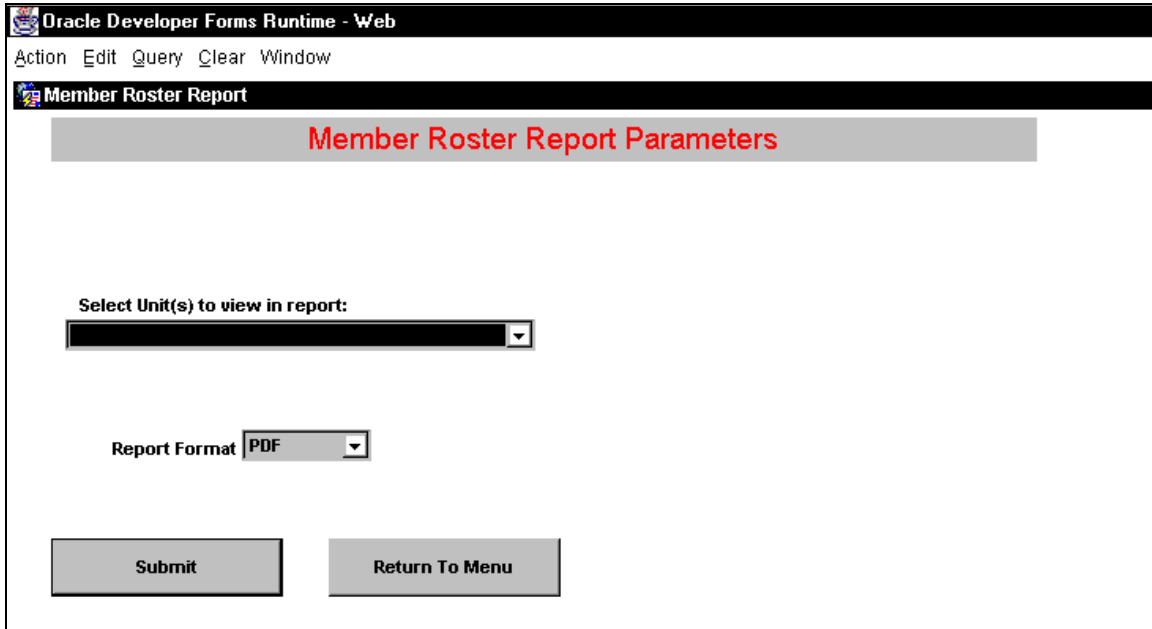
Figure 9-15 Member Roster Report Parameters Screen

Step 3: Click the arrow for the list box. Select the desired unit.

The unit appears in the box.

Step 4: Click **Submit**.

The Member Roster screen appears, similar to the following:

Figure 9-16 Member Roster Screen

Step 5: Click the **X** in the upper right-hand corner.

The window closes and the AUXMIS Reports Screen appears.

9.9 Return To Menu

The **Return to Menu** button allows you to return to the AUXDATA Main Menu. Perform the following steps to return to the AUXDATA Main Menu:

Step 1: From the AUXDATA Main Menu, click the REPORTS button.

The AUXDATA Reports menu appears.

Step 2: Click the Return To Menu button.

The AUXDATA Main Menu screen appears.

9.10 Member Anniversary Status

Step 1: From the AUXDATA Reports Menu, click the **Member Anniversary Status** button.

The Member Anniversary Status Report Parameters Screen appears, similar to the following:
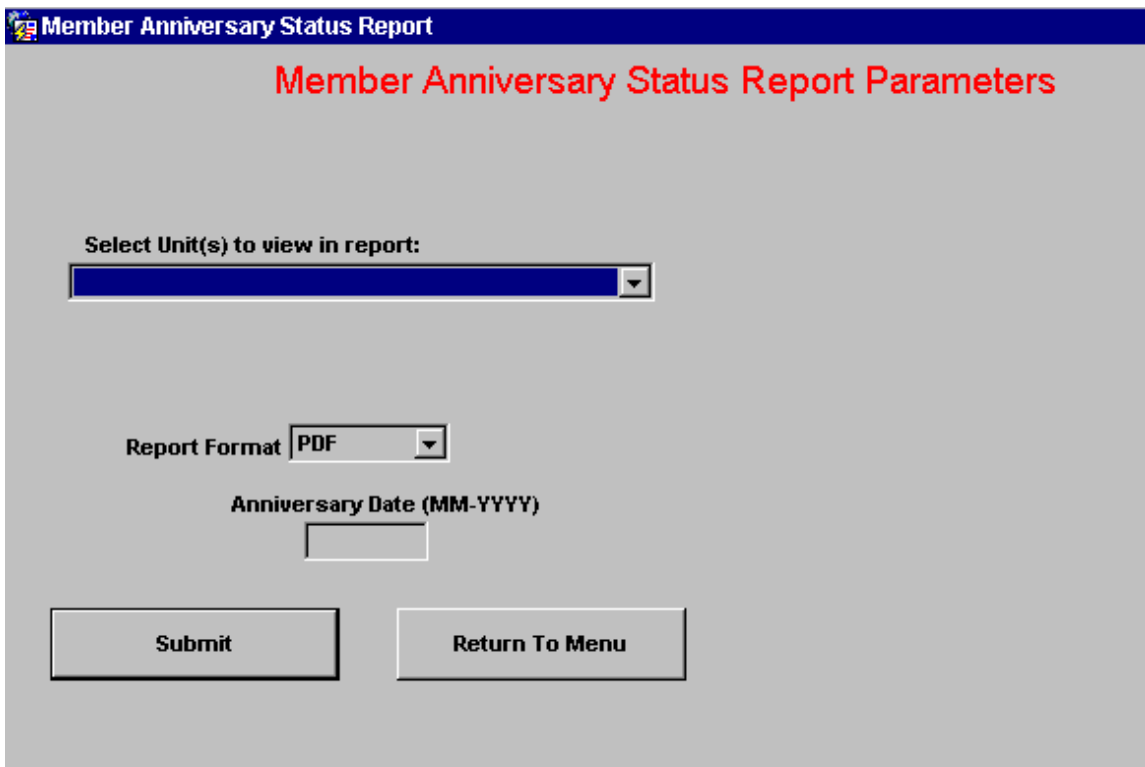
Figure 9-17 Member Anniversary Status Report Parameters Screen

Step 2: Select the unit to be viewed using the list box. Enter the desired *Anniversary Date*. Click the **Submit** button.

The Member Anniversary Status Screen appears, similar to the following:

Figure 9-18 Member Anniversary Status Screen

Step 3: Click the **X** in the upper right-hand corner.

The window closes and the AUXMIS Reports Screen appears.

9.11 Log Activity Summary

The **Log Activity Summary** button allows you to run a report on log activity summary from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run a Log Activity Summary report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Log Activity Summary] button.

The Log Activity Summary Report Parameters screen appears, similar to the following:
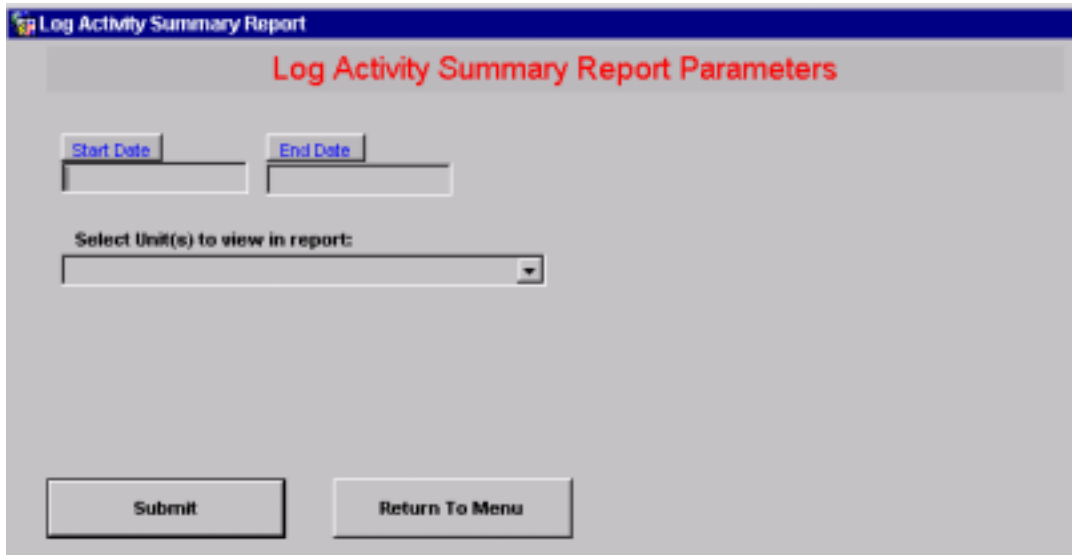
Figure 9-19 Activity Log Summary Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Log Activity Summary screen appears, similar to the following:

Log Activity Summary

130-07-06 HAYDEN ISLAND

UNITED STATES COAST GUARD AUXILIARY

| Reporting Period: | 01 JAN 2002 | Through: | 31 DEC 2002 |
| Days in Period: | 365 | Hours in Period: | 8760 |

Resource Class: RAD

HTN's Unit: 130-07-06   Resource Type: MOBILE   Hull/Tail Number: NM13CF

First Entry Date	Last Entry Date	Number of Log Entries	Date of CO's First Approval	Total CO Approval Count
24-FEB-2002 04:00	24-FEB-2002 04:00	1		0

Figure 9-20 Log Activity Summary Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXMIS Reports Screen appears.

9.12 Activity By State

The **Activity By State** button allows you to run a report on log activity summary from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an Activity By State report:

Step 1: From the AUXDATA Main Menu, click the **REPORTS** button.

The AUXDATA Reports menu appears.

Step 2: Click the [Activity By State] button.
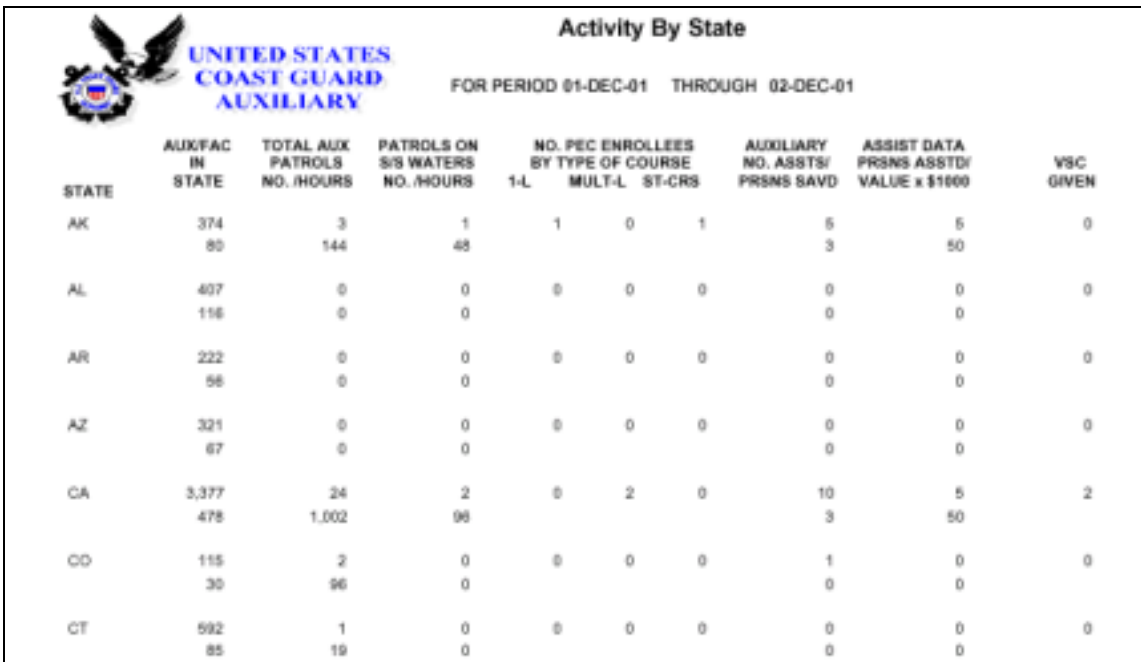
The Activity By State Report Parameters screen appears, similar to the following:

Figure 9-21 Activity By State Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Click **Submit**.

The Activity By State screen appears, similar to the following:

Figure 9-22 Activity By State Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXMIS Reports Screen appears.

9.13 Sailing List Detail

The **Sailing List Detail** button allows you to run a report on sail list detail from the Start Date to the End Date, Unit, Resource and Return to the Main Menu. Perform the following steps to run a Sailing List Detail report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Sailing List Detail] button.

The Sailing List Detail Report Parameters screen appears, similar to the following:
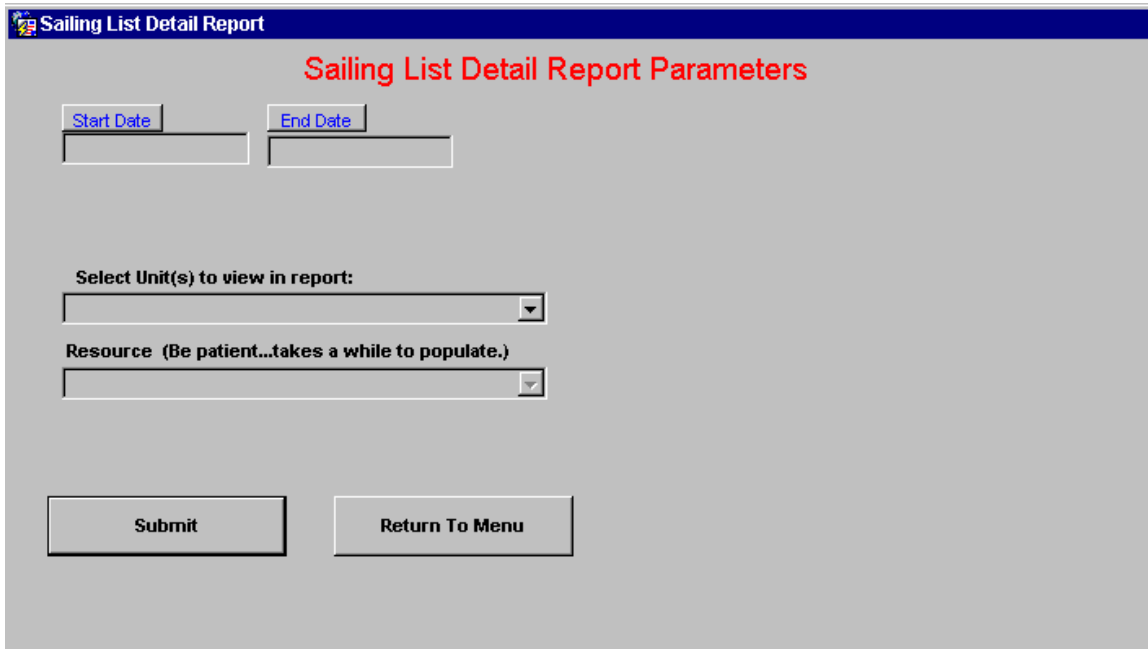
Figure 9-23 Sailing List Detail Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the desired unit and resource from the list box. Click **Submit**.

The Sailing List Detail screen appears, similar to the following:

Figure 9-24 Sailing List Detail Screen

Step 4: Click the **X** in the upper right-hand corner.
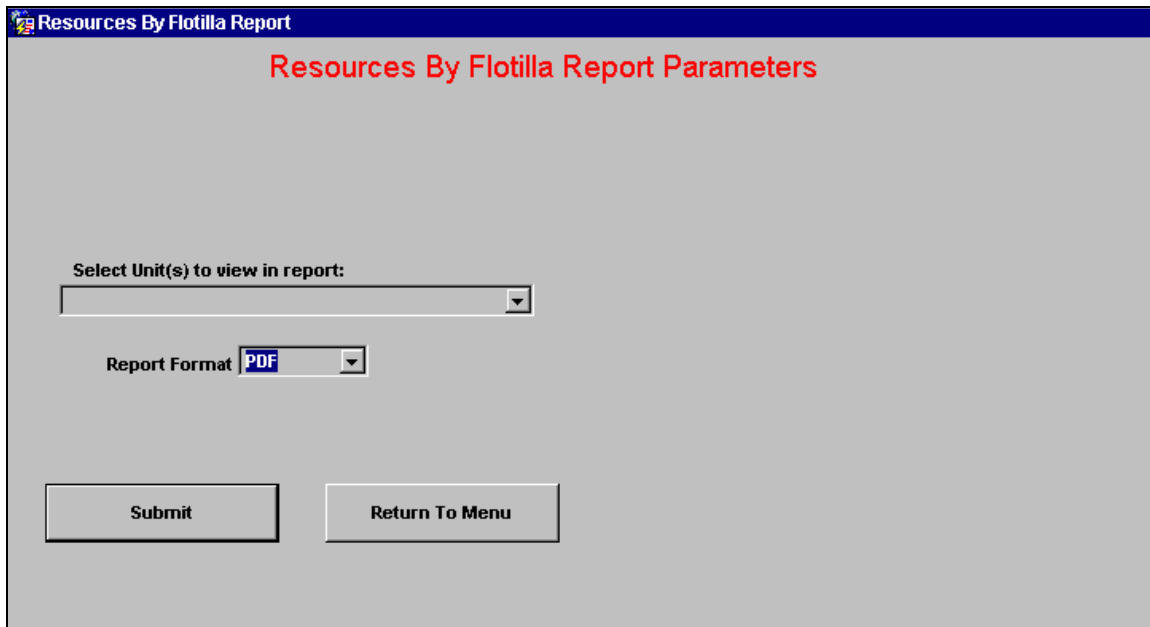
The window closes and the AUXDATA Reports menu appears.

9.14 Daily Sailing List
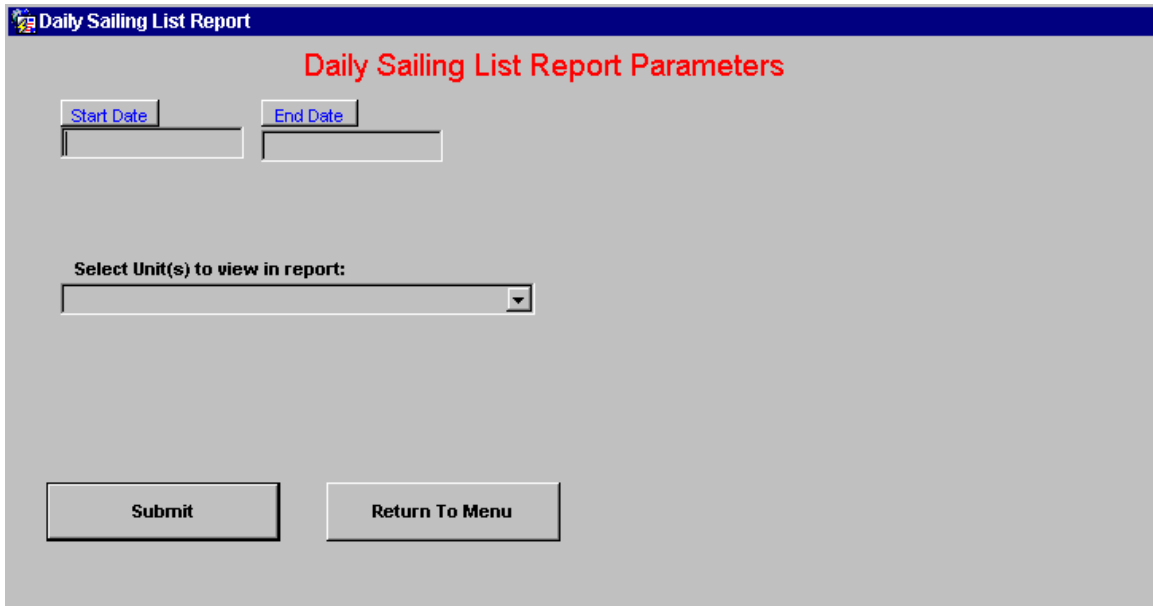
The **Daily Sailing List** button allows you to run a report on a daily sail list from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run a Daily Sailing List report:

Step 1: From the AUXDATA Main Menu, click the **REPORTS** button.

The AUXDATA Reports menu appears.

Step 2: Click the [Daily Sailing List] button.

The Daily Sailing List Report Parameters screen appears, similar to the following:

Figure 9-25 Daily Sailing List Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Daily Sailing List screen appears, similar to the following:

Daily Sailing List

HAYDEN ISLAND AND ALL SUB-UNITS

Reporting Period: 01-DEC-2001   Through: 02-DEC-2002

Days in Period: 367   Hours in Period: 8808

Resource Class Code: AIR	Resource Type Code FXGR		HTN: T2
Start Date: 13-MAY-02 04:00:00	Activity Code: ABN	Sub Activity Code: OPS	
Operation Code LEWCLA	Emp Category: CALL OUT	Claimant: 130	
Crewmember	Description	Emp ID	Crewmember's Unit
ANDERSON, KENNETH T	NON LEAD	1174174	130-07-06
Start Date: 13-MAY-02 17:00:00	Activity Code: EOM	Sub Activity Code: EOM	
Operation Code LEWCLA	Emp Category:	Claimant: 130	
Crewmember	Description	Emp ID	Crewmember's Unit
ANDERSON, KENNETH T	LEAD	1174174	130-07-06
Start Date: 15-MAY-02 04:00:00	Activity Code: ABN	Sub Activity Code: OPS	
Operation Code LEWCLA	Emp Category: CALL OUT	Claimant: 130	
Crewmember	Description	Emp ID	Crewmember's Unit

Figure 9-26 Daily Sailing List Screen

Step 4: Click the **X** in the upper right-hand corner.

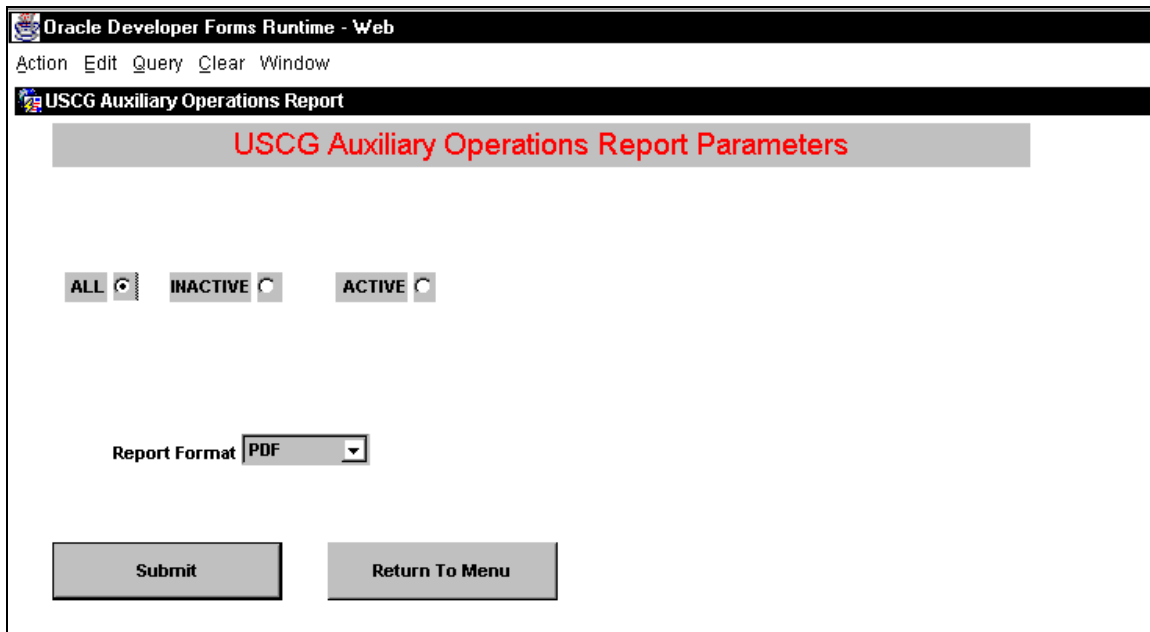*The window closes and the AUXDATA Reports menu appears.*

9.15 Underway Resource Hours
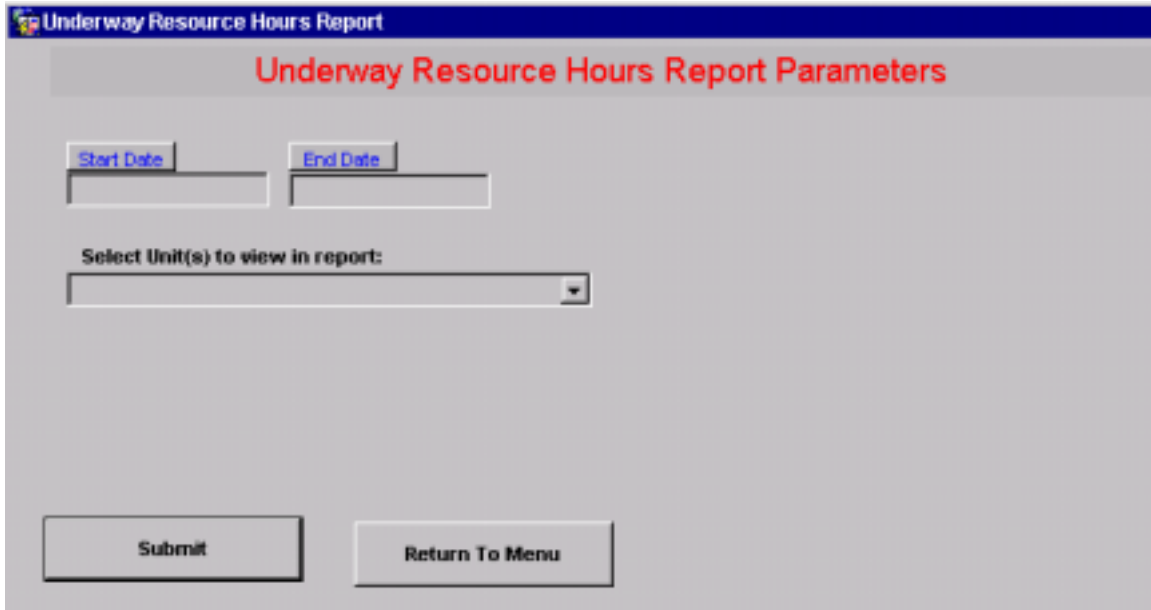
The **Underway Resource Hours** button allows you to run a report on an underway resource hours from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an Underway Resource Hours report:

Step 1: From the AUXDATA Main Menu, click the **REPORTS** button.

The AUXDATA Reports menu appears.

Step 2: Click the [Underway Resource Hours] button.

The Underway Resource Hours Report Parameters screen appears, similar to the following:

Figure 9-27 Underway Resource Hours Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Underway Resource Hours screen appears, appears, similar to the following:

Figure 9-28 Underway Resource Hours Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.16 Days Underway

The **Days Underway** button allows you to run a report on the days the vessel is underway from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run a Days Underway report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Days Underway] button.

The Days Underway Report Parameters screen appears, similar to the following:
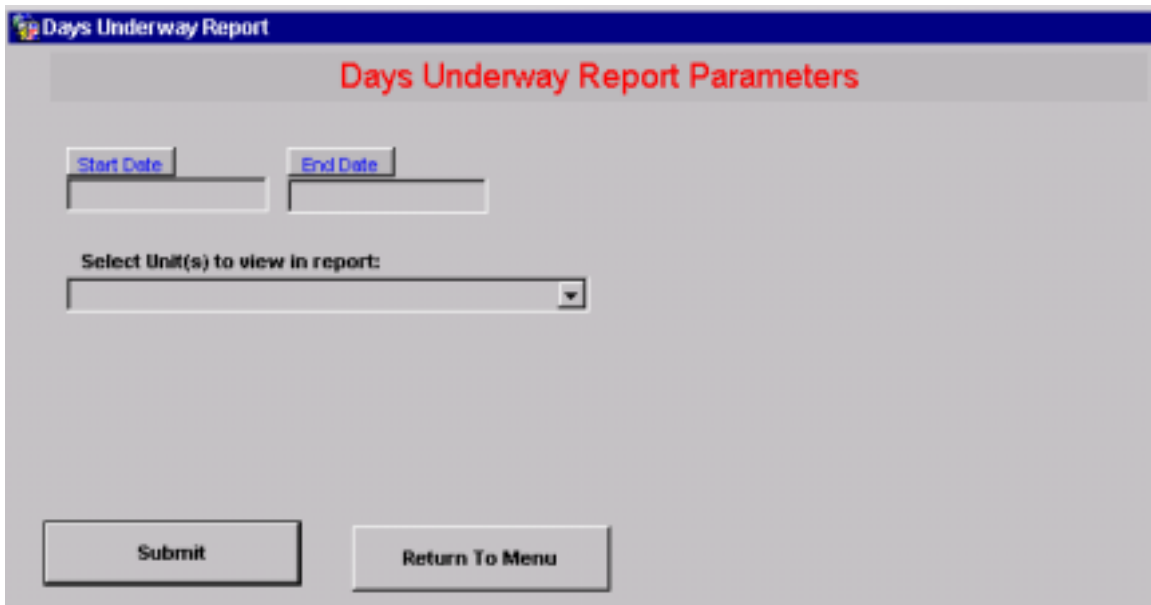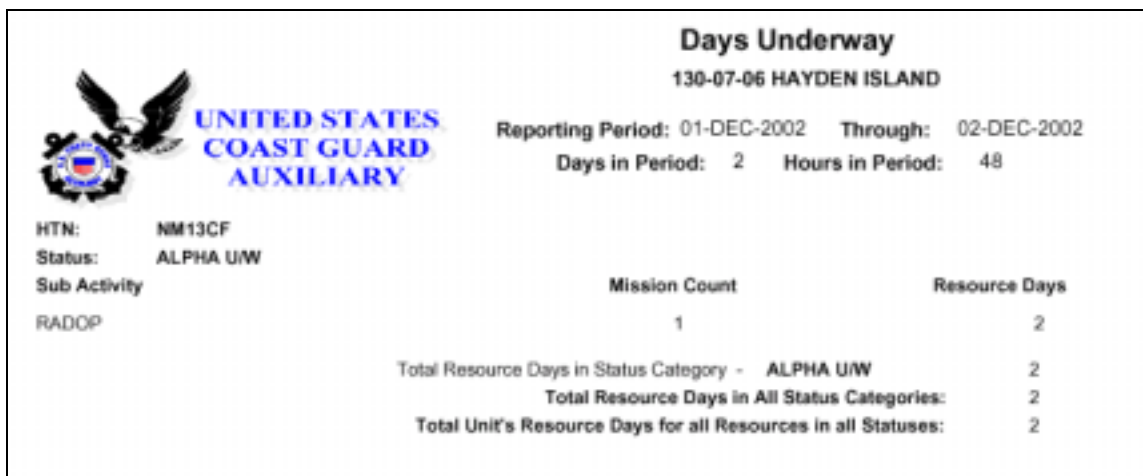
Figure 9-29 Days Underway Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Days Underway screen appears, similar to the following:

Figure 9-30 Days Underway Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports menu appears.

9.17 Underway Activity and Crew
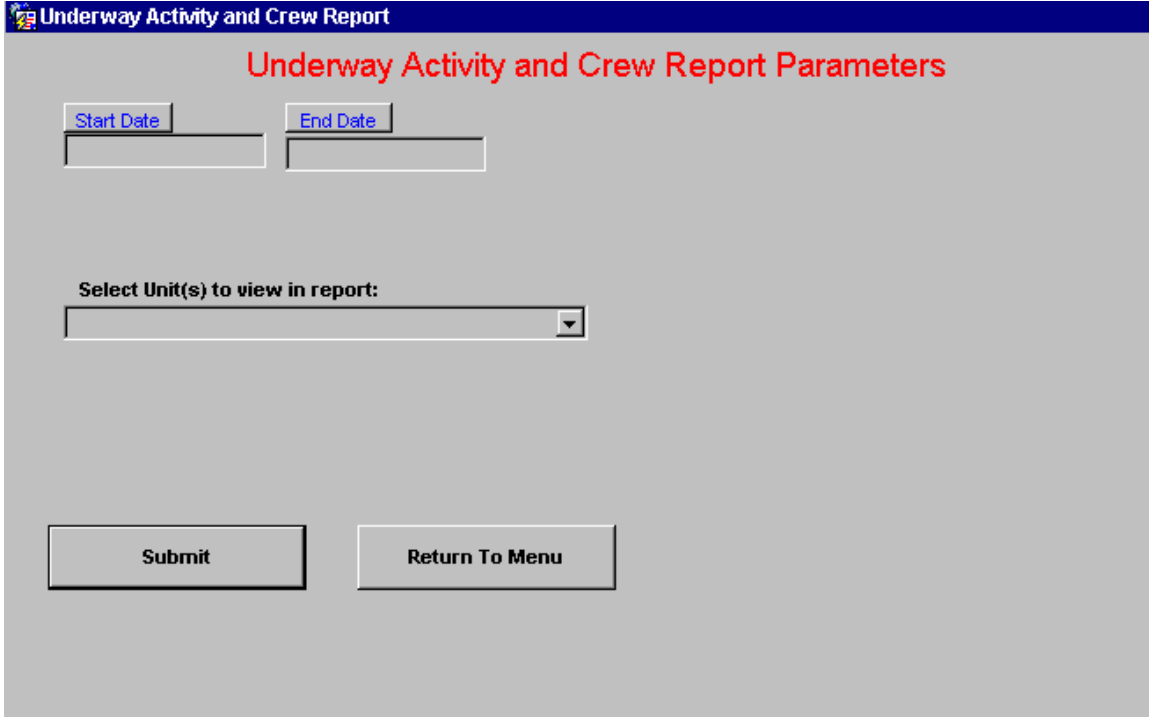
The **Underway Activity and Crew** button allows you to run a report on underway activity and crew from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an Underway Activity and Crew report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Underway Activity and Crew] button.
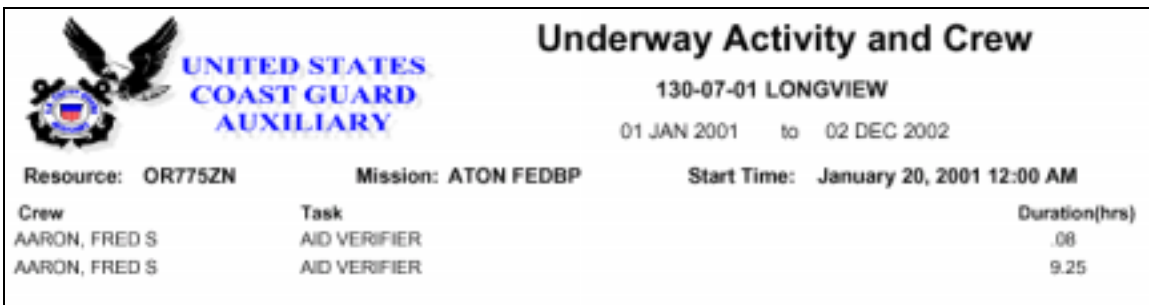
> *The Underway Activity and Crew Report Parameters screen appears, similar to the following:*

Figure 9-31 Underway Activity and Crew Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

> *The Underway Activity and Crew screen appears, similar to the following:*

Figure 9-32 Underway Activity and Crew Screen

Step 4: Click the **X** in the upper right-hand corner.

> *The window closes and the AUXDATA Reports menu appears.*

9.18 Underway Crew
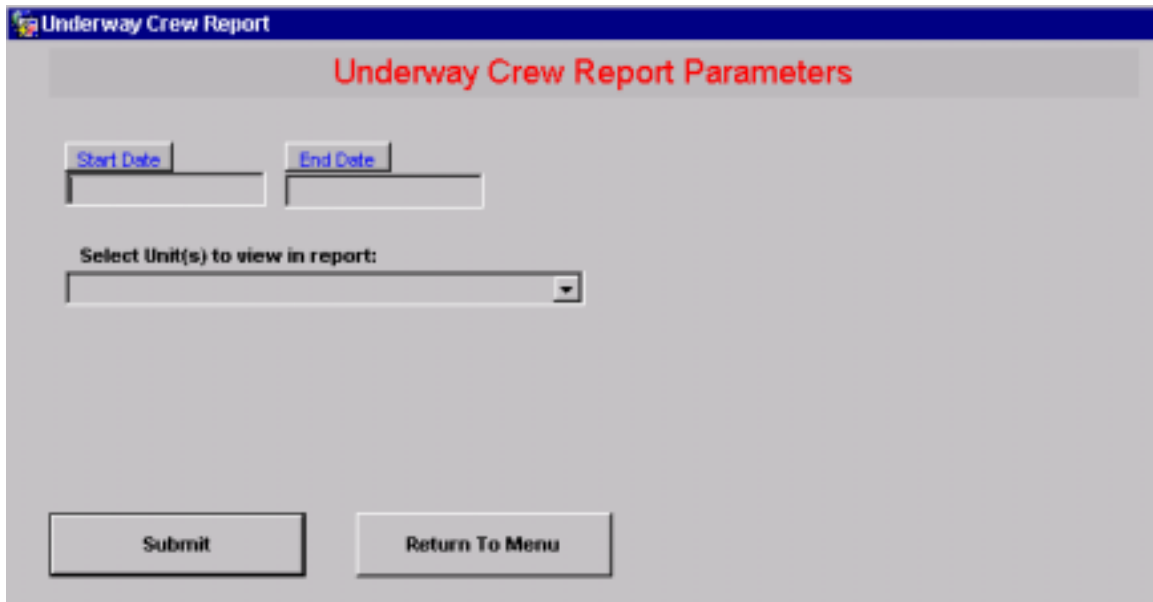
The **Underway Crew** button allows you to run a report on underway crew from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an Underway Crew report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

> *The AUXDATA Reports menu appears.*

Step 2: Click the [Underway Crew] button.

> *The Underway Crew Report Parameters screen appears, similar to the following:*

Figure 9-33 Underway Crew Report Parameters Screen

Step 3: Enter the desired *Start Date* and *End Date*. Select the unit to be viewed using the list box. Click **Submit**.

The Underway Crew screen appears, similar to the following:

UNITED STATES COAST GUARD AUXILIARY

Underway Crew
130-07-01 LONGVIEW

01 JAN 2001   Through   02 DEC 2002

REPORT RUN 28-FEB-2002 07:59

FULL NAME	MISSIONS	NIGHT HOURS	TOTAL HOURS
AARON, FRED S	1	.00	
ANDERSON, KENNETH T	3	.00	578.00
ANDREASEN, RICHARD I	2	.00	1.00
ARNOLD, ROBERT L	1	.00	1206.00
AXINN, RICHARD	1	.00	1206.00
BALFOUR, WILLIAM M	2	.00	4.78
BALKEMA, DOUGLAS R	1	.00	1206.00
BALL, MAX E	1	.00	1.00
BANEY, JOE E	2	.00	1210.78
BANNON, PATRICIA A	1	.00	1206.00
BARTLETT, RONALD L	2	.00	578.00
DREHER, ANGELA R	1	.00	1206.00

Figure 9-34 Underway Crew Screen

Step 4: Click the **X** in the upper right-hand corner.

The window closes and the AUXDATA Reports Screen appears.

9.19 Address and Flotilla Data

The **Address and Flotilla Data** button allows you to run a report on the Address and Flotilla Data from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run an Address and Flotilla Data report:

Step 1: From the AUXDATA Main Menu, click the [**REPORTS**] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Address And Flotilla Data] button.

The Address and Flotilla Data Report Parameters screen appears, similar to the following:
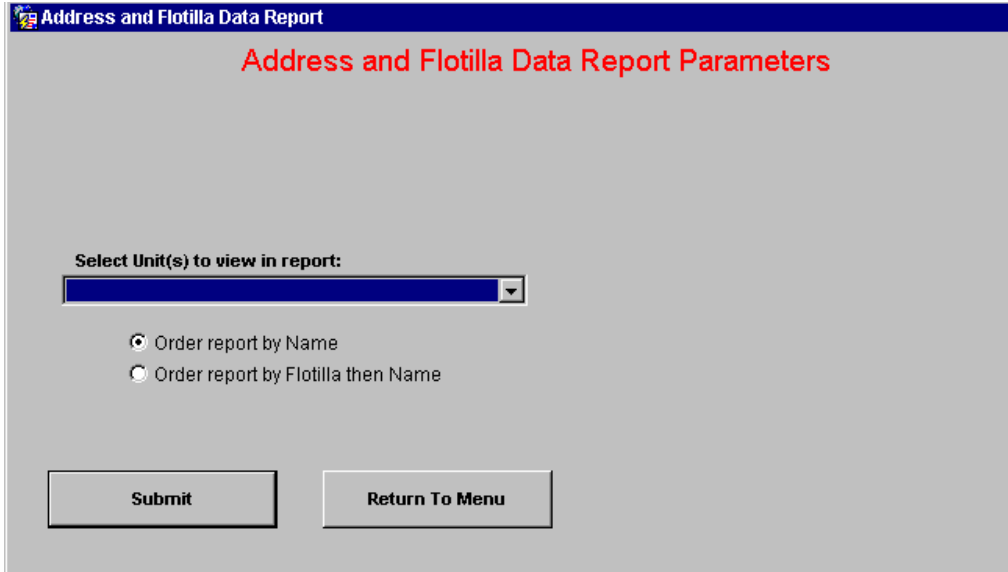
Figure 9-35 Address and Flotilla Data Report Parameters Screen

Step 3: Click the list box arrow. Select the desired unit. Select **Order report by Name** or **Order report by Flotilla then Name**.

The unit appears in the box.

Step 4: Click **Submit**.

The Address and Flotilla Data screen appears, similar to the following:

Figure 9-36 Address and Flotilla Data Screen

Step 5: Click the **X** in the upper right-hand corner.

The window closes and the AUXMIS Reports screen appears.

9.20 Unit Summary
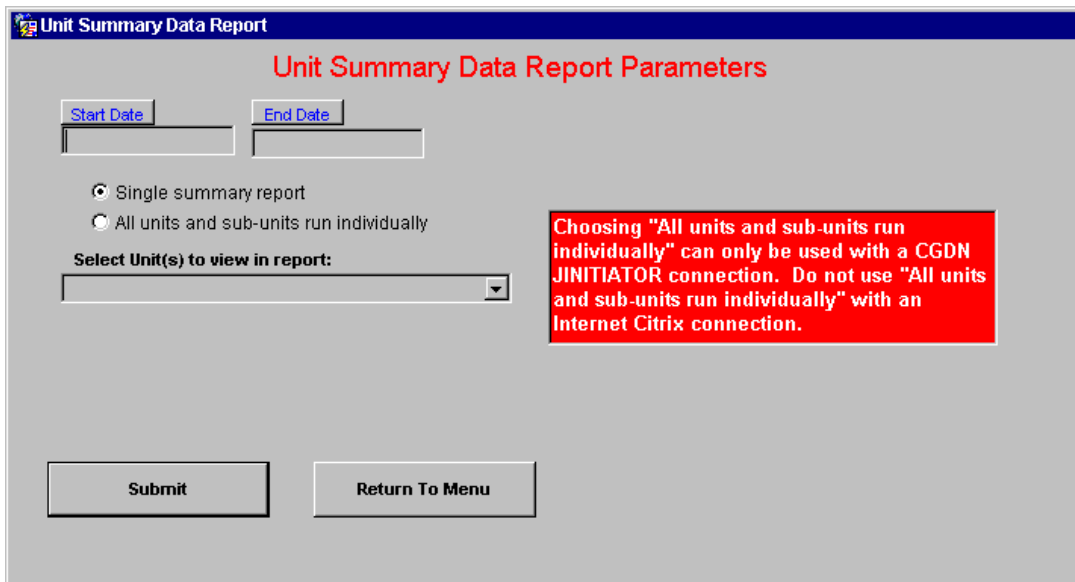
The **Unit Summary** button allows you to run a report on unit summary from the Start Date to the End Date and Return to the Main Menu. Perform the following steps to run a Unit Summary report:

Step 1: From the AUXDATA Main Menu, click the [REPORTS] button.

The AUXDATA Reports menu appears.

Step 2: Click the [Unit Summary Data] button.

The Unit Summary Data Report Parameters screen appears, similar to the following:

Figure 9-37 Unit Summary Data Report Parameters Screen

Step 2: Select the desired report, and then select the unit to be viewed using the list box. Click the desired unit.

The Unit Summary Data screen appears, similar to the following:

Figure 9-38 Unit Summary Data Screen

Step 3: Click the **X** in the upper right-hand corner to close the report.

9.21 Quarterly Billing Report

The Quarterly Billing report contains the employee ID, name, and enrollment date for each member at a specified district that enrolled during a specified quarter and year, broken down by flotilla. Only users that have the billing role can run this report.

Perform the steps below to run this report.

Step 1: From the AUXDATA Main Menu, click the REPORTS button.

The AUXDATA Reports menu appears.

Step 2: Click the Quarterly Billing report button.

The Quarterly Billing Report Parameters screen appears.
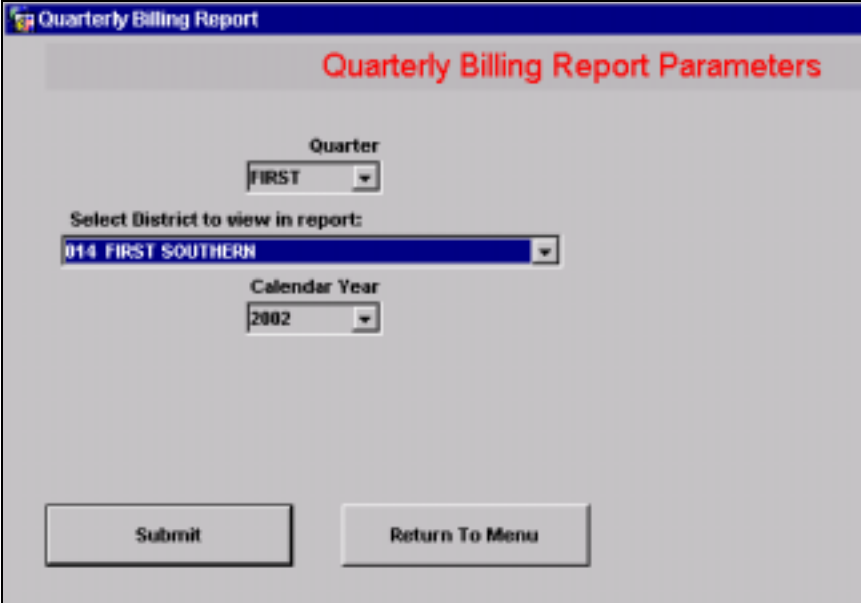
Figure 9-39 Quarterly Billing Report Parameters

Step 3: Select from the list boxes the quarter, the district you wish to view in the report, and the calendar year.

Step 4: Click the **Submit** button.

A Quarterly Billing Report appears for the specified quarter and year:

New Enrollees

FIRST   2002

Unit Number		Emp Id		Name	Enrollment
0130104		1193312		AAA,AAA	01-JAN-02
0130104		1193465		AAAAA,KJGLKJ LKJFL	01-JAN-02
Flotilla	04	added	2	new member(s)	
Division	01301	added	2	new member(s)	

Unit Number	Emp Id	Name	Enrollment
0130201	1199983	FOSLER,KEITH G	03-JAN-02
0130201	1199812	HALL,WAYNE H	03-JAN-02
0130201	1199811	MICHAUD,BERNARD R	03-JAN-02
0130201	1200175	PATTERSON,W D	03-JAN-02

Figure 9-40 Quarterly Billing Report

Step 5: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ⊠ at the upper right-hand corner of the window.

9.22 Annual Billing Report

The Annual Billing report contains the Unit Number, Employment ID, and person's name, including an indication of past district commodores (PDCO), for each member in a specified district that enrolled during the year, broken down by flotilla. Only users that have the billing role can run this report.

Perform the steps below to run this report.

Step 1: From the AUXDATA Main Menu, click the **REPORTS** button.

> *The AUXDATA Reports menu appears.*

Step 2: Click the **Annual Billing** report button.

> *The Annual Billing Report Parameters screen appears.*
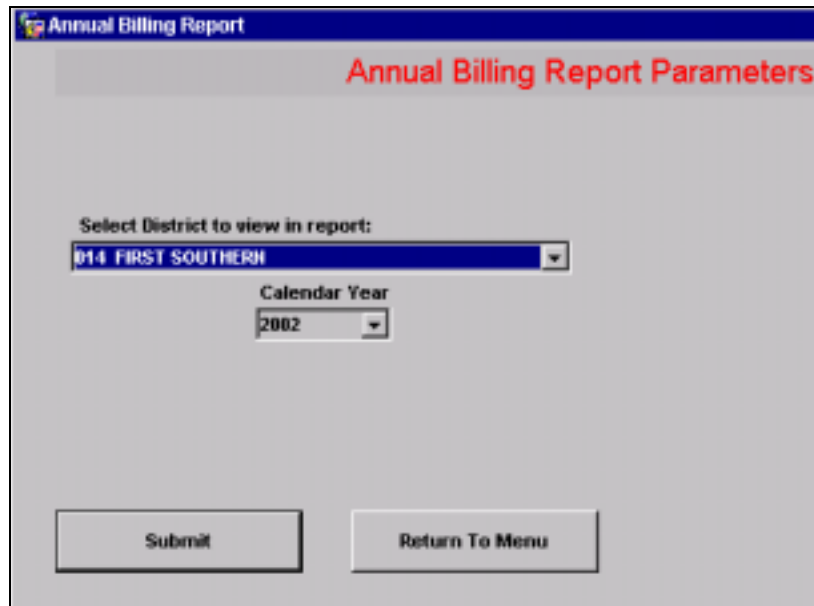
Figure 9-41 Annual Billing Report Parameters

Step 3: Select from the list boxes the district you wish to view in the report and the calendar year.

Step 4: Click the **Submit** button.

An Annual Billing Report appears for the specified district and year:

Annual Billing

District 014   2002

Unit Number	Emp Id	Name	PDCO
0140101	1149114	ADELMANN,ROGER M	
0140101	1011306	ALIFF,WILLIAM	
0140101	1146588	AUER,JOHN R	
0140101	1149059	AUER,MARGUERITE	
0140101	1149916	BELLO,MICHAEL	
0140101	1147388	BRUNJES,EDWIN H	
0140101	1148487	BRUNJES,MARGARET	
0140101	1149257	CLIFFORD,PATRICK J	
0140101	1180146	COLON,CINDY A	
0140101	1180482	COLON,JOSE A	
0140101	1192114	DALY,JOHN P	
0140101	1150536	DAMM,JOSEPH E	

Figure 9-42 Annual Billing Report

Step 5: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ☒ at the upper right-hand corner of the window.

9.23 Admin Reports

Several Admin Reports are available to AUXDATA users who have administrative privileges. These reports retrieve and summarize data at the district level and Coast Guard wide, depending on your access level. See the sections below for instructions to run the individual Admin reports.

To access the Admin Reports menu:

Step 1: From the AUXDATA main menu, click **Reports**.

The Reports menu appears, displaying the Admin Reports button.

Step 2: From the Reports menu, click [**Admin Reports**].

The Admin Reports menu appears.

Figure 9-43 Admin Reports Menu

Step 3: Choose the desired report option.

9.23.1 PE Performance Awards Due Report

This report provides a list of Auxiliary personnel who are due for a PE Performance Award, based on earned credits. To run this report, follow the steps below.

Step 1: From the Admin Report menu click [PE Performance Awards].

The PE Performance Awards Report parameter screen appears.
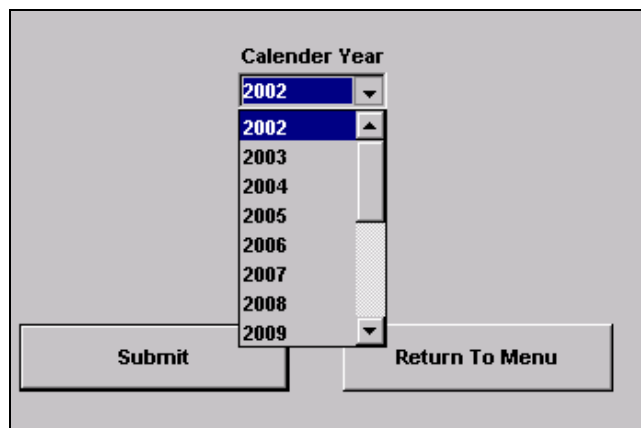
Figure 9-44 PE Performance Awards Report Parameter

Step 2: From the drop box select the calendar year you wish to define the report.

Step 3: Click [Submit].

A PE Performance Awards Due report appears for the selected calendar year.

Unit Number	Member No.	Name	Inst	Aide	Credits	Prev - Last
130-01-01	1173800	ALBERT, STEVE J	26	9	30.5	
130-01-01	1184364	FARINHA, MICHAEL A	43	10	48	
130-01-02	1173719	JENSEN, ALLEN S	62	24	74	1 - 12/31/2000
130-01-02	1174186	OLSON, CHARLES E	46	25	58.5	
130-01-07	1148838	BERMINGHAM, JOHN B	8	56	36	
130-01-07	1146270	BOERNER, BILL	4	79	43.5	
130-01-07	1172371	DEAN, RUSSELL H JR	19	101	69.5	
130-01-07	1171707	KRIEG, JOHN T	43	83	84.5	
130-01-07	1169190	MCKEAN, JOHN S	73	41	93.5	1 - 12/31/2000
130-01-08	1004705	FORD, ANTHONY B	36	21	46.5	
130-01-08	1173787	LOKEN, DONALD L	4	64	36	1 - 12/31/2000

Figure 9-45 PE Performance Awards Report

9.23.2 VE/MDV Performance Awards Report

This report provides a list of Auxiliary personnel who are due for a VE/MDV Performance Award, based on earned credits. To run this report, follow the steps below.

Step 1: From the Admin Report menu click [VE/MDV Performance Awards].

The VE/MDV Performance Awards Report parameter screen appears.
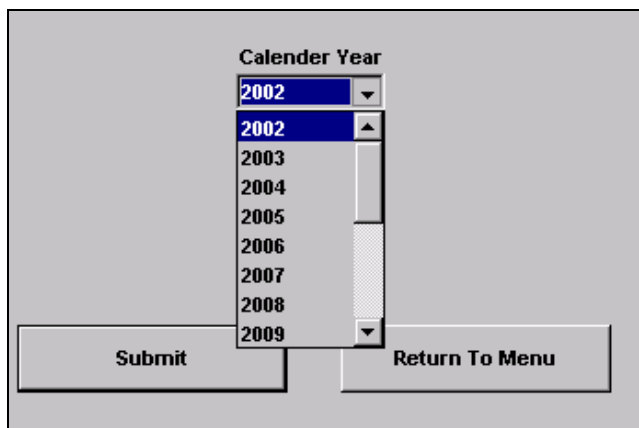
Figure 9-46 VE/MDV Performance Awards Report Parameter

Step 2: From the drop box select the calendar year you wish to define the report.

Step 3: Click [Submit].

A VE/MDV Performance Awards Due report appears for the selected calendar year.

Figure 9-47 VE/MDV Performance Awards Report

9.23.3 Operations Performance Awards Report

This report provides Auxiliary members' accumulative hours in operations and support for the issuance of an Operations and Performance Award. Perform the steps below to run this report.

Step 1: From the Admin Reports menu, click <button>Operations Performance Awards.

The Operations Performance Awards report parameter screen appears:
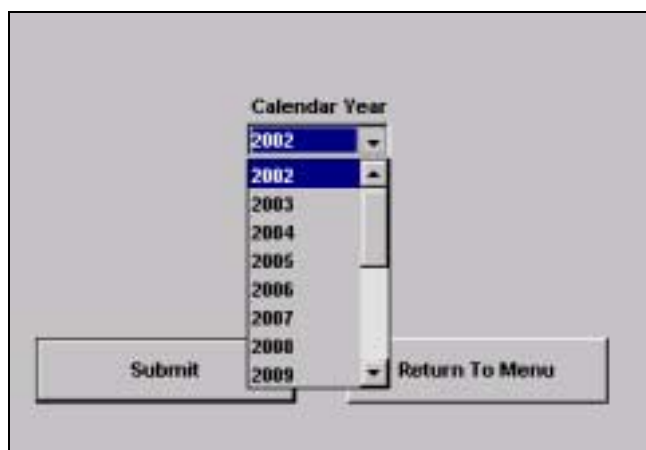
Figure 9-48 Operations Performance Awards Report Parameters

Step 2: Select the year you would like to report on from the drop box.

Step 3: Click the **Submit** button.

An Operations Performance Awards Due report appears for the selected year. See the example below.

Figure 9-49 Operations Performance Awards Due Report

9.23.4 Sustained Auxiliary Service Award

This report provides Auxiliary members' total service hours for the issuance of a Sustained Auxiliary Service Award. Perform the steps below to run this report.

Step 1: From the Admin Reports menu, click [**Sustained Service Awards**] .

The Sustained Auxiliary Service Award report parameters screen appears:

Figure 9-50 SSA Report Parameters

Step 2: From the drop box, select the district you wish to report on.

Step 3: Click the **Submit** button.

A Sustained Auxiliary Service Award Report appears, as shown in the example below:

UNITED STATES COAST GUARD AUXILIARY

Sustained Auxiliary Service Award Status

District 114

Unit Number	Member No.	Name	TotHrs	AwdHrs	Prev - Last
1140204	1172133	MILLER, RICHARD B	4488	1488	4 - 01/07/2000
1140204	1163670	SUTIS, DAMASO H	6249	999	7 - 11/16/2001
1140210	1174738	MONROE, MARK N	2413	913	2 - 09/30/2002
1140303	1156150	VATZ, ROBERT H	2314	814	2 - 11/26/2000
1140304	1152689	RICHARDSON, JOHN F	5370	870	6 - 09/30/2002
1140305	1174692	ANTHONY, LEE	2342	842	2 - 06/01/2000
1140308	1169905	RICHTER, CHARLES N	3166	916	3 - 09/30/2002
1140310	1175108	BROMBEREK, JOHN E	2262	762	2 - 01/07/2000
1140405	1153922	MCDONOUGH, JOSEPH J	3033	783	3 - 11/26/2000
1140503	1175206	DELUCIA, JOHN R	1552	802	1 - 01/07/2000
1140506	1177568	FLYNN, DONALD J	1602	852	1 - 09/30/2002
1140506	1176945	SCHLOSSER, DONALD C	1597	847	1 - 11/16/2001
1140703	1147129	ROM, JOSEPH W	7767	1017	9 - 09/30/2002
1140902	1174277	KAUFMAN, HARRY E	1532	782	1 - 11/26/2000
1140904	1176175	HAUSER, CHARLES E	1501	751	1 - 06/01/2000
1140906	1172562	FRIZZELL, RICHARD D	2876	1376	2 - 11/26/2000

Figure 9-51 SSA Report

10. TRAINING

The **Training** button allows you to insert, update, and delete tasks and competencies, insert and update assignments, capture tasks, view references, and insert, update, and delete certifications using the TMT Screen. The following sections elaborate on the specific buttons the TMT allows. Perform the following step to access TMT:

10.1 Accessing TMT

Step 1: Click the [**Training**] button from the AUXDATA Main Menu.

The Training Management Tool Main Menu appears, similar to the following:

Figure 10-1 Training Management Tool Main Menu

10.2 Assignments

The **Assignments** button allows you to assign competencies to units, tasks to competencies, and competencies to people.

10.2.1 Assign Competencies to Units

Perform the following steps to assign competencies to units:

Step 1: From the TMT Main Menu, click the **Assignments** button.

Step 2: Click the   ASSIGN COMPETENCIES TO UNITS   button.

The Unit Selection screen appears, similar to the following:

Select	Level	Unit Number	Unit Name	St...
☑	NATL	0 - - -	AUXILIARY NATIONAL UNIT	DC
☐	DIST	001- - -	TEST001	
☐	DIV	001-01- -	TEST00101	
☐	FLOT	001-01-01-	TEST0010101	
☐	DIST	081- - -	ALLIGATOR DISTRICT	AL
☐	DIV	081-01- -	NW FLA SE ALA SSW GA	FL
☐	FLOT	081-01-20-	TEST FLOTILLA TWO	AS
☐	FDET	081-01-20-001	TEST DETACHMENT	FL
☐	FLOT	081-01-46-	UNIT RES TEST II	
☐	FLOT	081-01-48-	UNIT RES TEST IV	
☐	FLOT	081-01-49-	UNIT RES TEST V	
☐	FLOT	081-01-75-	TEST OFFICERS 75	
☐	FLOT	081-01-76-	TEST FOR OFFICER INSERT	
☐	FLOT	081-01-77-	TEST FOR OFFICER INSERT	
☐	FLOT	081-01-79-	K-JAD FIVE TEST	CA

Select All   Return to Menu

Figure 10-2 Unit Selection Screen

Step 3: Select the check boxes for the unit(s) you wish to assign competencies.

The Units are checked.

Step 4: Click the **Assignments** tab.

The Assignments screen appears, similar to the following:

Figure 10-3 Assignments Screen

Step 5: Select the competency desired under **Available Competencies**. Click [>].

The selected competencies are moved from the Available Competencies to Assigned Competencies.

10.2.2 Assign Tasks to Competencies

Perform the following steps to assign tasks to competencies:

Step 1: From the TMT Main Menu, click the **Assignments** button.

Step 2: Click the **ASSIGN TASKS TO COMPETENCIES** button.

The Competencies Selection screen appears, similar to the following:

Select	Short Title	Competency Description	Category
☐	NE	AID TO NAVIGATION (MTCN) TECHNICIAN	BOAT
☐	AV	AID TO NAVIGATION VERIFIER	BOAT
☐	AIRCP	AIR CO-PILOT	AIR
☐	AIRCREW	AIR CREW	AIR
☐	AIRFP	AIR FIRST PILOT	AIR
☐	AIROBS	AIR OBSERVER	AIR
☐	AIRAC	AIRCRAFT COMMANDER	AIR
☐	AUXOP	AUXOP	GEN
☐	BBC	BASIC BOATING COURSE	GEN
☐	BCCOX	BOAT CREW COXSWAIN	BOAT
☐	BCCREW	BOAT CREW CREWMEMBER	BOAT
☐	CFVE	COMMERCIAL FISHING VESSEL EXAMINER	GEN
☐	INSP	COMPLETED PILOT INSPECTION	AIR
☐	TYPEATP	FAA AIR TRANSPORT PILOT	AIR
☐	TYPECOMM	FAA COMMERCIAL PILOT	AIR

Return to Menu

Figure 10-4 Competencies Selection Screen

Step 3: Select the check boxes for the competencies you wish to assign tasks.

The competencies are checked.

Step 4: Click the **Assignments** tab.

The Assignments Selection screen appears, similar to the following:

Figure 10-5 Assignments Selection Screen

Step 5: Click the Available Tasks you wish to assign. Click ⬚ .

The selected tasks are moved from the Available Tasks to the Assigned Tasks.
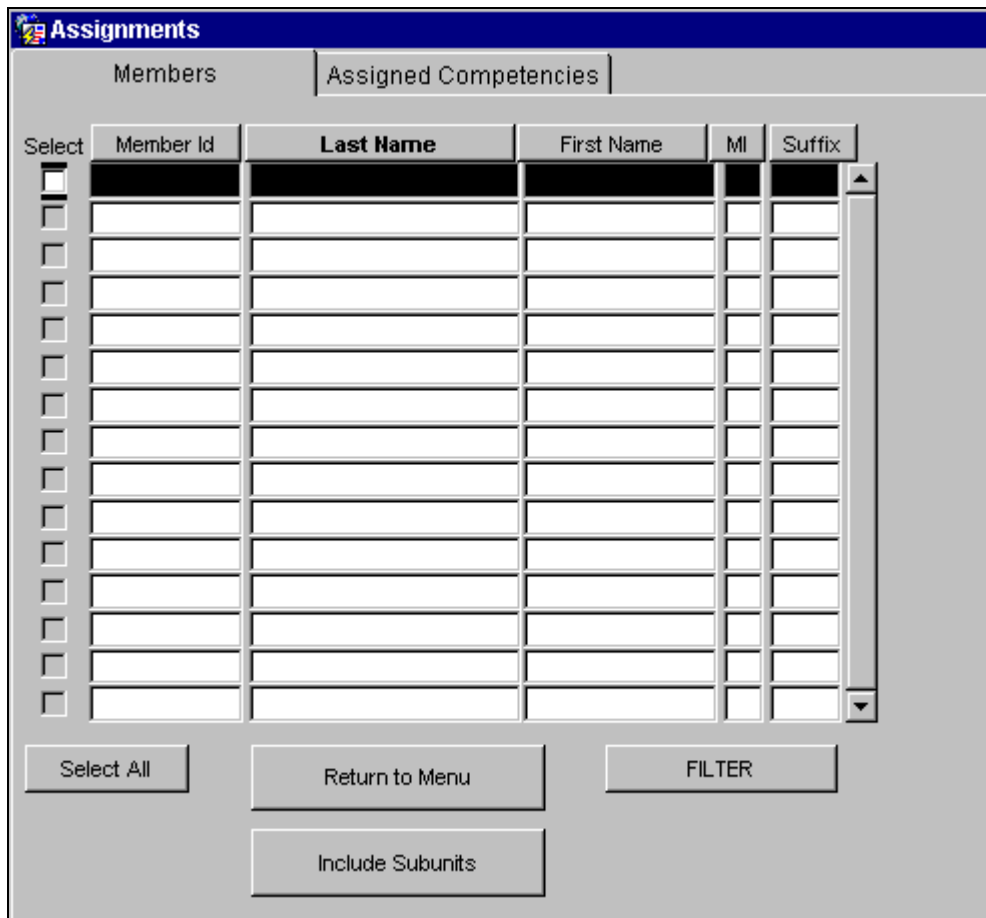
10.2.3 Assign Competencies to People

Perform the following steps to assign competencies to people:

Step 1: From the TMT Main Menu, click the **Assignments** button.

Step 2: Click the ASSIGN COMPETENCIES TO PEOPLE button.

The Members Selection screen appears, similar to the following:

Figure 10-6 Members Selection Screen

Step 3: Select the check boxes for the members you wish to assign competencies. If needed, use the **Filter** feature to shorten the list of members displayed.

The members are checked.

Step 4: Click the **Assigned Competencies** tab.

The Assigned Competencies screen appears, similar to the following:

Figure 10-7 Assigned Competencies Screen

Step 5: Select the member(s) desired.

The member selected is highlighted.

Step 6: Under Available Competencies, select the competencies you wish to assign.

The Available Competencies are highlighted.

Step 7: Click [>].

The selected competencies are moved from the Available Competencies to the Assigned Competencies, and are assigned to the selected members.
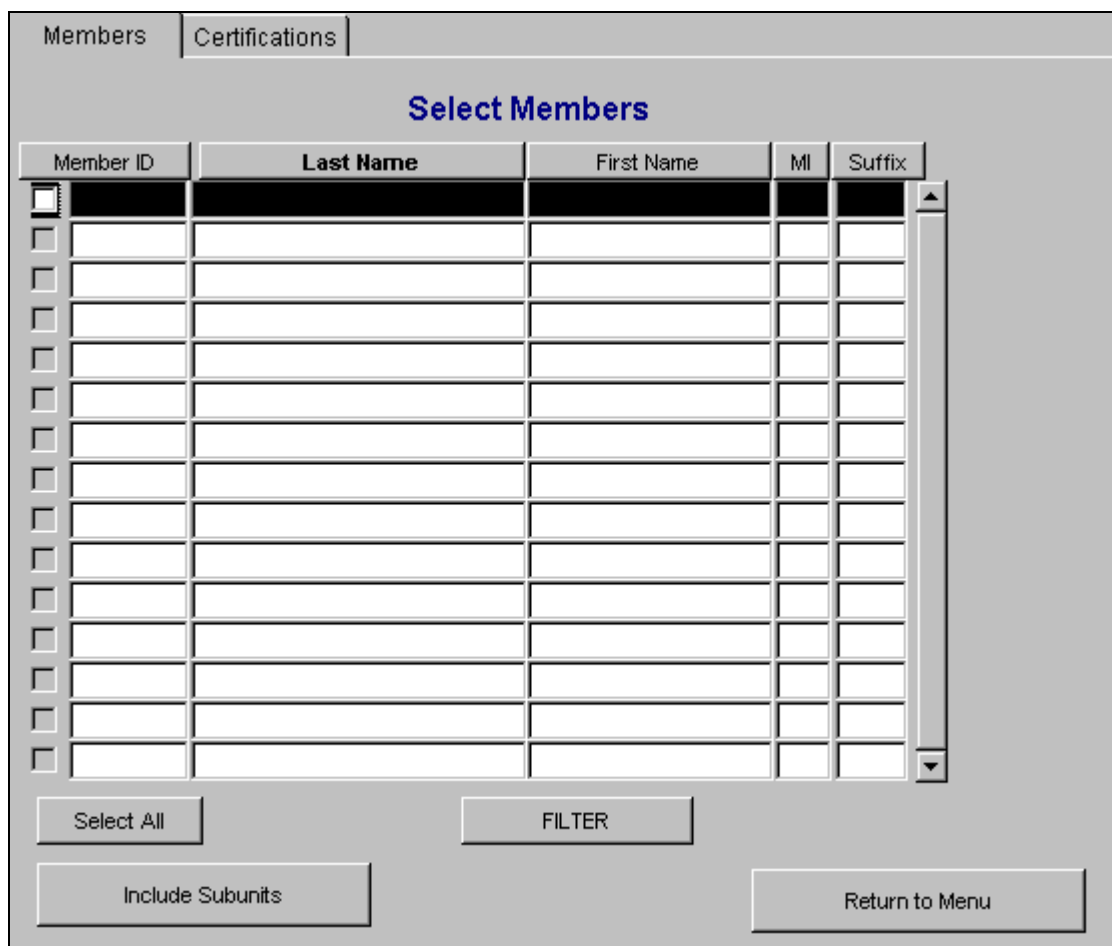
10.3 Certifications

The **Certifications** button allows you to view individual certifications for your units' and subordinate units' crewmembers. Perform the following steps to view certifications:

Step 1: From the TMT Main Menu, click the **Assignments** button.

Step 2: Click the [**CERTIFICATIONS**] button.

The Members Selection screen appears, similar to the following:

Figure 10-8 Members Selection Screen

Step 3: Select the check boxes for the members whose certification you wish to view. If needed, use the **Filter** feature to shorten the list of crewmembers displayed.

The member selected is highlighted.

Step 4: Click the **Certifications** tab.

The Certifications screen appears, similar to the following:

Figure 10-9 Certifications Screen

Step 5: Select the member desired.

The member selected is highlighted.

Step 6: Click the Uncertified Assigned Competencies desired.

The selected Uncertified Assigned Competencies are highlighted.

Step 7: Click [>].

The selected competencies are moved from the All Uncertified Assigned Competencies to Certifications.

Step 8: Click the Calendar button ([X]). Select the date and click **OK**.
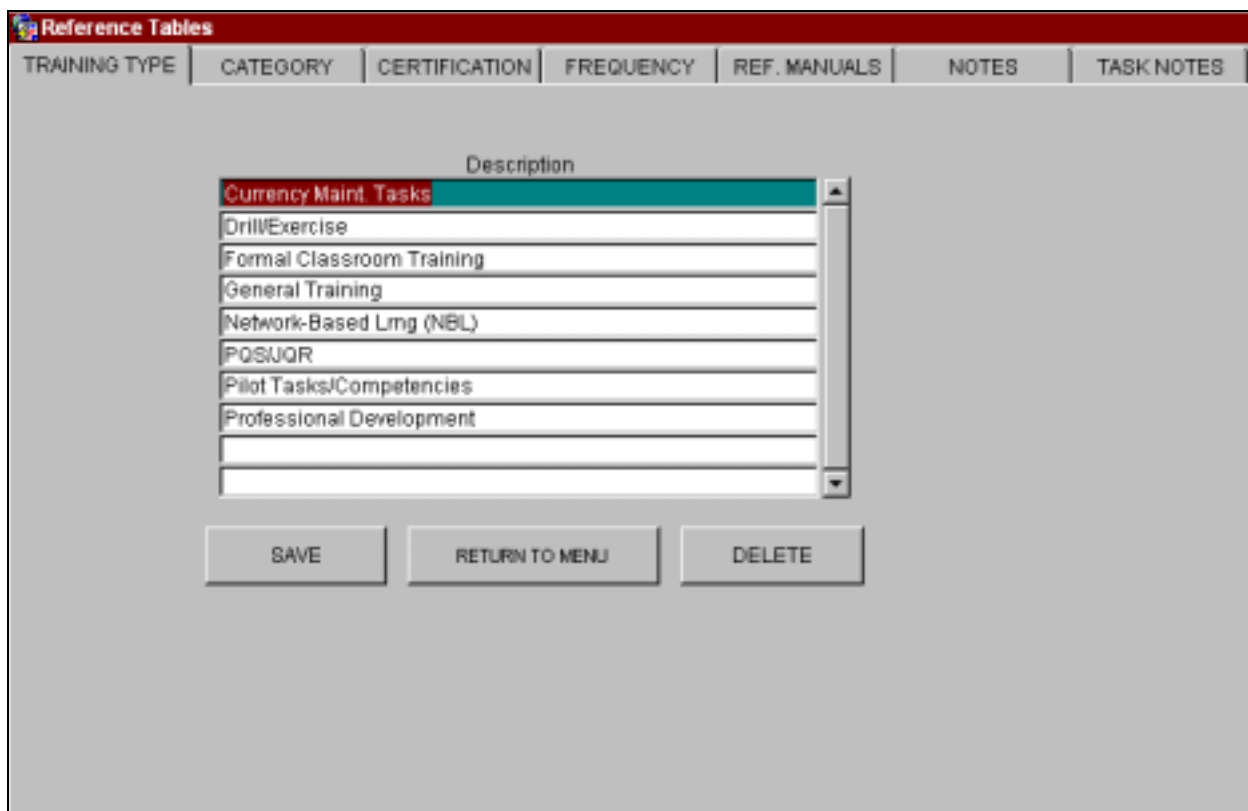
The Certification Date is entered and saved.

10.4 Reference Tables

The **Reference Tables** button allows you to insert and delete the following: training type, category, certification, frequency, reference manuals, notes, and task notes for reference. This section provides instructions for performing these tasks. Perform the following step to access the Reference Tables feature:

Step 1: From the TMT Main Menu click the   [REFERENCE TABLES]   button.

The Reference Tables screen appears, similar to the following:

Figure 10-10 Reference Tables Screen

10.4.1 Training Type

Perform the following steps to insert and delete training type descriptions:

Step 1: From the TMT Main Menu, click the [REFERENCE TABLES] button.

Step 2: Select the next available text box on the Training Type screen. Enter the information for the new training type description. Click **Save**.

> *The new Training Type is entered and saved.*

Step 3: Select the Training Type description to be deleted. Click **Delete**.

> *The Training Type description is deleted.*
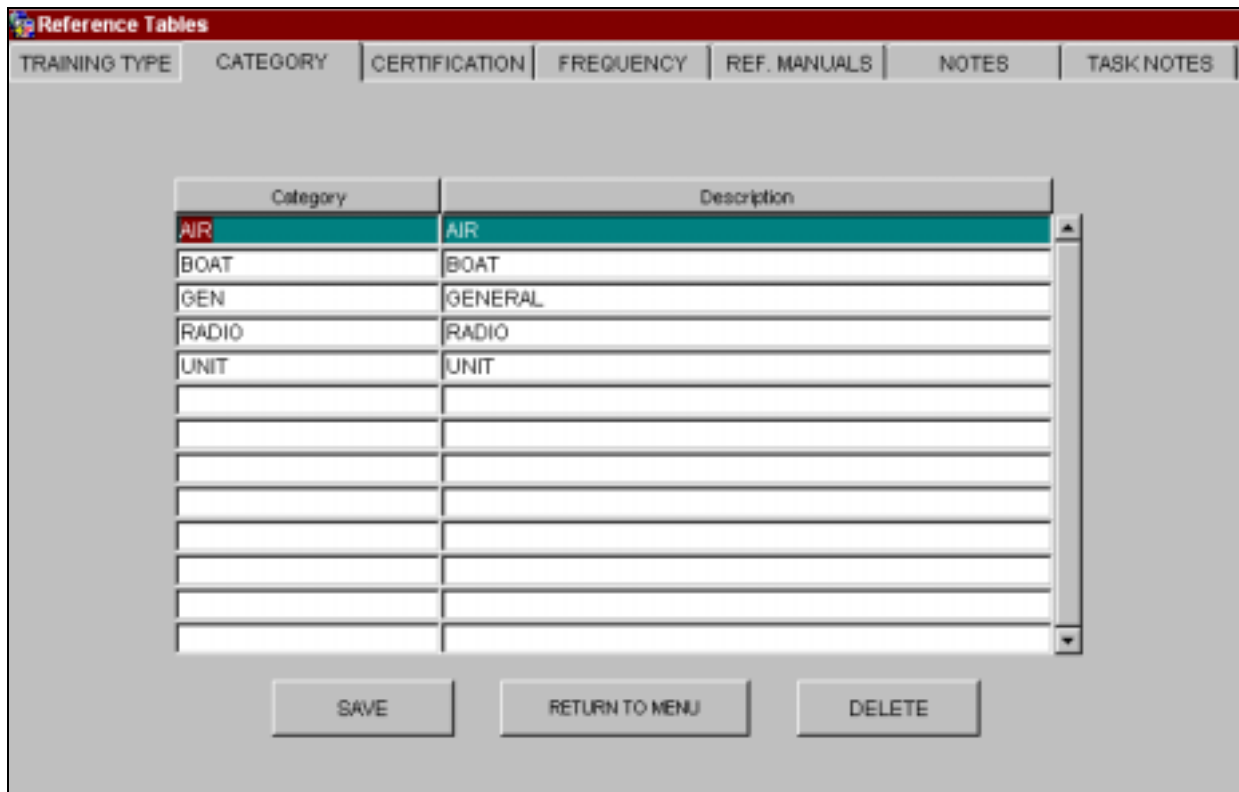
10.4.2 Category

Perform the following steps to insert and delete categories:

Step 1: From the TMT Main Menu, click the [REFERENCE TABLES] button.

Step 2: Click the **Category** tab.

> *The Category screen appears, similar to the following:*

Figure 10-11 Category Screen

NOTE: If you wish to delete a category, skip to Step 4.

Step 3: Select the next available text box on the Category screen. Enter the information for the new category and description. Click **Save**.

> *The new Category is entered and saved.*

Step 4: Select the Category to be deleted. Click **Delete**.

> *The Category is deleted.*

10.4.3 Certification

Perform the following steps to insert and delete certifications:

Step 1: From the TMT Main Menu, click the **REFERENCE TABLES** button.

Step 2: Click the **Certification** tab.

> *The Certification screen appears, similar to the following:*
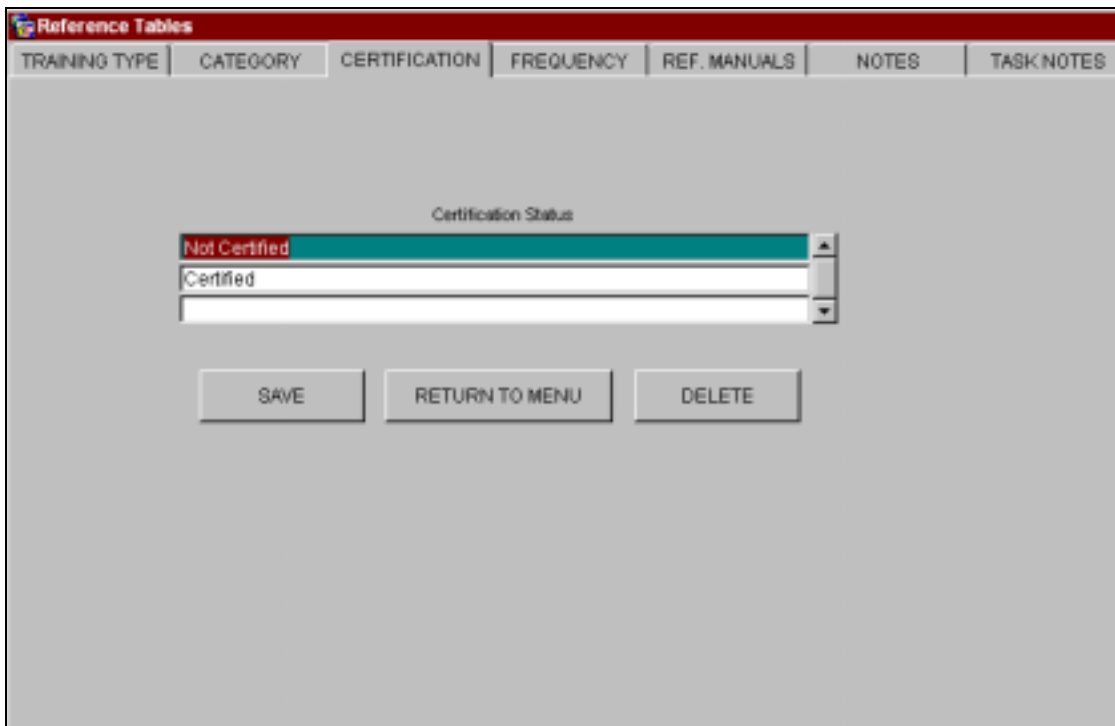
Figure 10-12 Certification Screen

NOTE: If you wish to delete a category, skip to Step 4.

Step 3: Select the next available text box on the Certification screen. Enter the information for the new Certification Status. Click **Save**.

> *The Certification Status is entered and saved.*

Step 4: Click the Certification Status to be deleted. Click **Delete**.

The Certification Status is deleted.

10.4.4 Frequency

Perform the following steps to insert and delete frequencies:

Step 1: From the TMT Main Menu, click the [REFERENCE TABLES] button.

Step 2: Click the **Frequency** tab.

The Frequency screen appears, similar to the following:

Months	Description
5	Bi-Weekly (Once every two weeks)
1	Monthly
2	Bi-Monthly (Once every two months)
3	Quarterly
6	Semiannual
12	Annual
24	Biennial
36	Triennial
60	Five Years
120	Ten Years
180	Fifteen Years
240	Twenty Years
300	Twenty-Five Years
9999	Permanent

SAVE   RETURN TO MENU   DELETE

Figure 10-13 Frequency Screen

NOTE: If you wish to delete a category, skip to Step 4.

Step 3: Select the next available text box on the Frequency screen. Enter the information for the month and description. Click **Save**.

The Frequency is entered and saved.

Step 4: Select the Frequency to be deleted. Click **Delete**.

The Frequency is deleted.

10.4.5 Ref. Manuals

Perform the following steps to insert and delete reference manuals:

Step 1: From the TMT Main Menu, click the [**REFERENCE TABLES**] button.

Step 2: Click the **Ref. Manuals** tab.

The Ref. Manuals screen appears, similar to the following:

Figure 10-14 Ref. Manuals Screen

NOTE: If you wish to delete a category, skip to Step 4.

Step 3: Select the reference to be modified. Enter the information for the Manual Type. Click **Save**.

The Manual Type is entered and saved.

Step 4: Select the Manual to be deleted. Click **Delete**.

The Manual is deleted.

10.4.6 Notes

Currently the Notes are not being used by AUXDATA.

Step 1: From the TMT Main Menu, click the [**REFERENCE TABLES**] button.

Step 2: Click the **Notes** tab.

The Notes screen appears, similar to the following:

Figure 10-15 Notes Screen

10.4.7 Task Notes

Currently the Task Notes are not being used by AUXDATA.

Step 1: From the TMT Main Menu, click the **REFERENCE TABLES** button.

Step 2: Click the **Task Notes** tab.

The Task Notes screen appears, similar to the following:
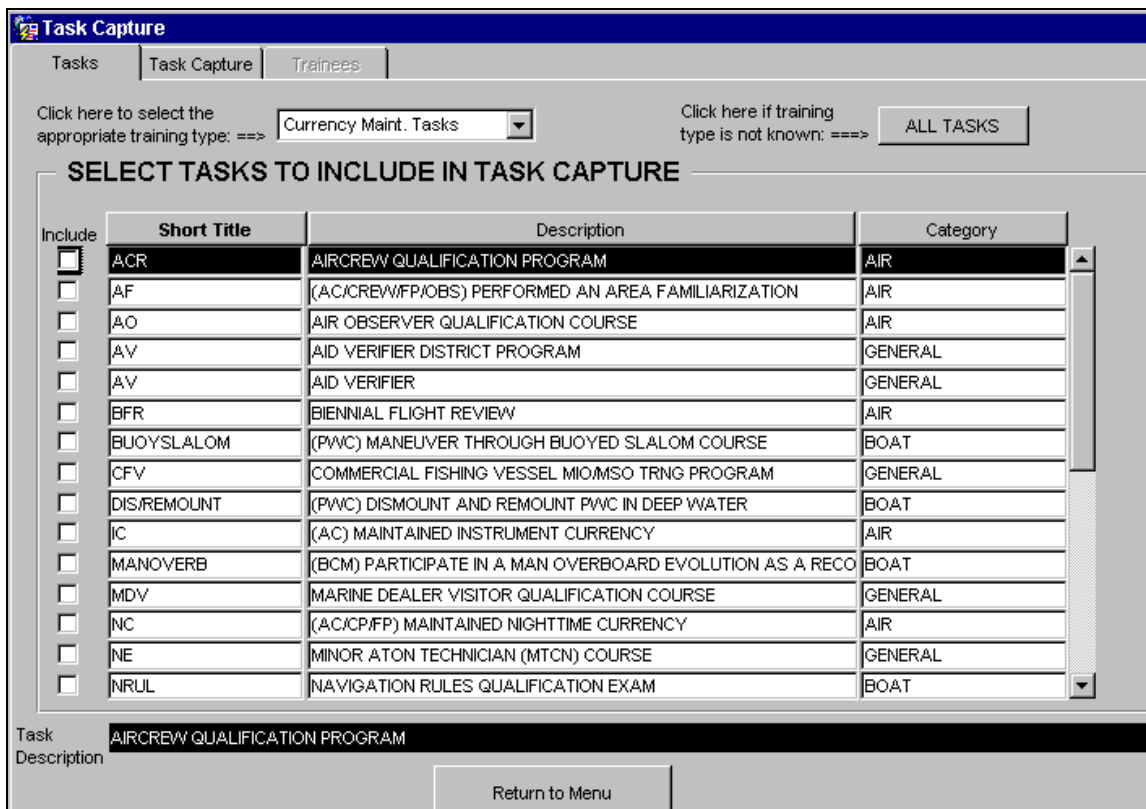
Figure 10-16 Task Notes Screen

10.5 Task Capture

The **Task Capture** button allows you to capture tasks and include eligible participants. This section provides instructions for performing these functions. Perform the following step to access Task Capture:

Step 1: From the TMT Main Menu, click the [TASK CAPTURE] button.

The Tasks Screen appears, similar to the following:

Figure 10-17 Tasks Screen

10.5.1 Tasks

Perform the following step to select the tasks to include in the task capture:

Step 1: Select the check boxes for the tasks you wish to capture.

The tasks are checked.
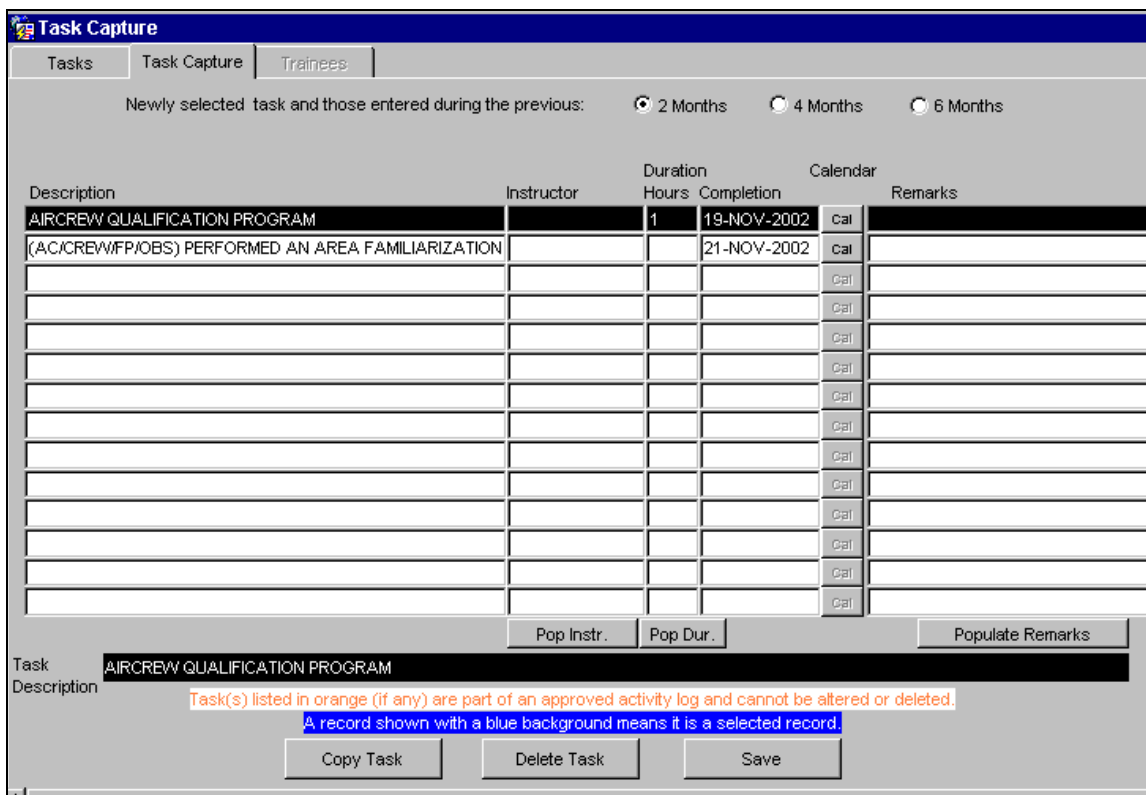
10.5.2 Task Capture

The Task Capture screen allows you to view the task captured in the following time periods: 7 days, 30 days, 90 days, 180 days, and 1 year. Perform the following steps to select the tasks to include in the task capture:

Step 1: From the TMT Main Menu, click the [**TASK CAPTURE**] button.

Step 2: Click the **Task Capture** tab.

> *The Task Capture screen appears, similar to the following:*

Figure 10-18 Task Capture Screen

Step 3: Select description desired.

> *The description is highlighted.*

Step 4: Enter the necessary information by pressing the **TAB** key after each entry or using the list boxes when available. Click **Save**.

> *The information is entered and saved.*

Step 5: If you wish to copy a task, click the [Copy Task] button.

> *The Task highlighted is copied to the next available text box.*

Step 6: If you wish to delete a task, click the [Delete Task] button.

> *The Task highlighted is deleted.*
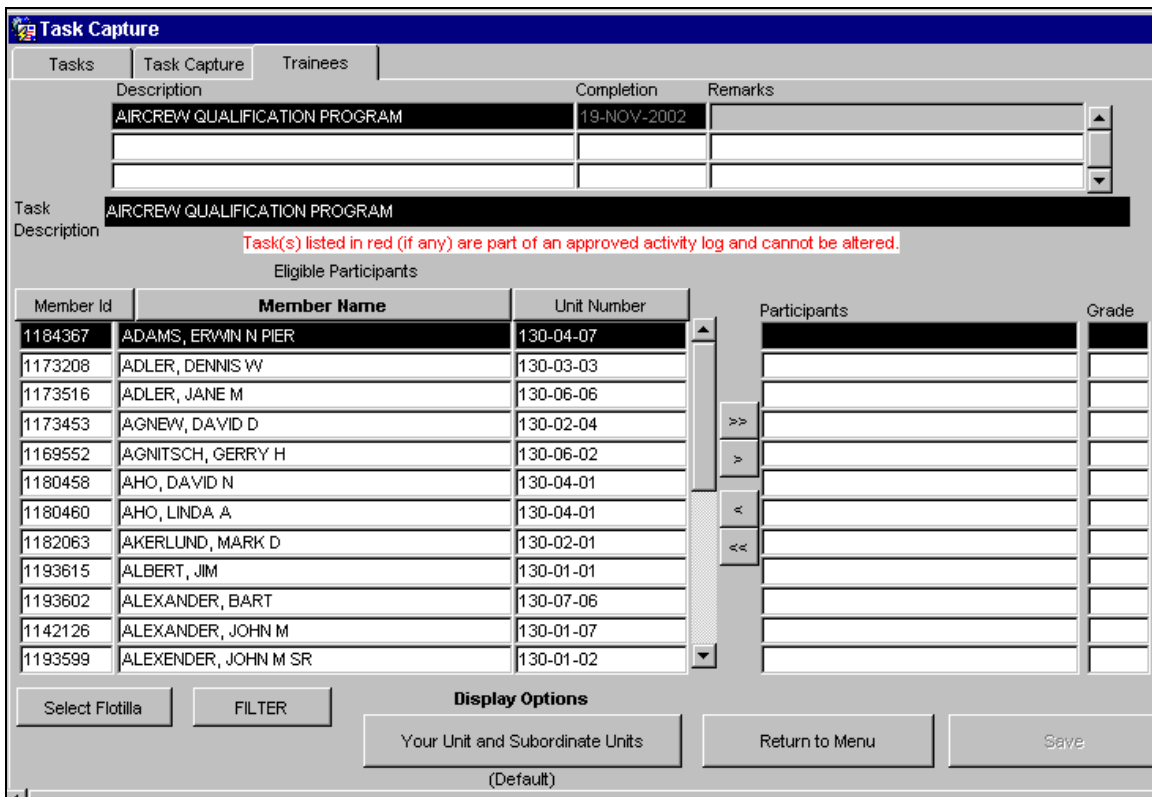
10.5.3 Trainees

The Trainees screen allows you to move Eligible to Participate members to Participants (in your unit and subordinate units) in the tasks that are captured. Perform the following steps to select the participants to include in the tasks capture:

Step 1: From the TMT Main Menu, click the [**TASK CAPTURE**] button.

Step 2: Click the **Trainees** tab.

> *The Trainees screen appears, similar to the following:*

Figure 10-19 Trainees Screen

Step 3: Select the description of the task desired.

Step 4: Click [>>] to include all of the members as participants. If not all members participated, select the desired members and then click [>]. If needed, use the **Filter** feature to shorten the list of members displayed.

> *The member is highlighted and moved from **Eligible Participants** to **Participants**.*

10.6 Task Maintenance

The **Task Maintenance** button allows you to insert, update, and delete active and inactive tasks for your unit and/or subordinate units and return to the TMT Main Menu. Perform the following steps to access the task maintenance feature:

Step 1: From the TMT Main Menu, click the [TASK CAPTURE] button.

Step 2: Click the [TASK Maintenance] button.

The Task Maintenance screen appears, similar to the following:

Figure 10-20 Task Maintenance Screen

Step 3: Proceed to the following sections for instructions on performing the various duties in Task Maintenance.
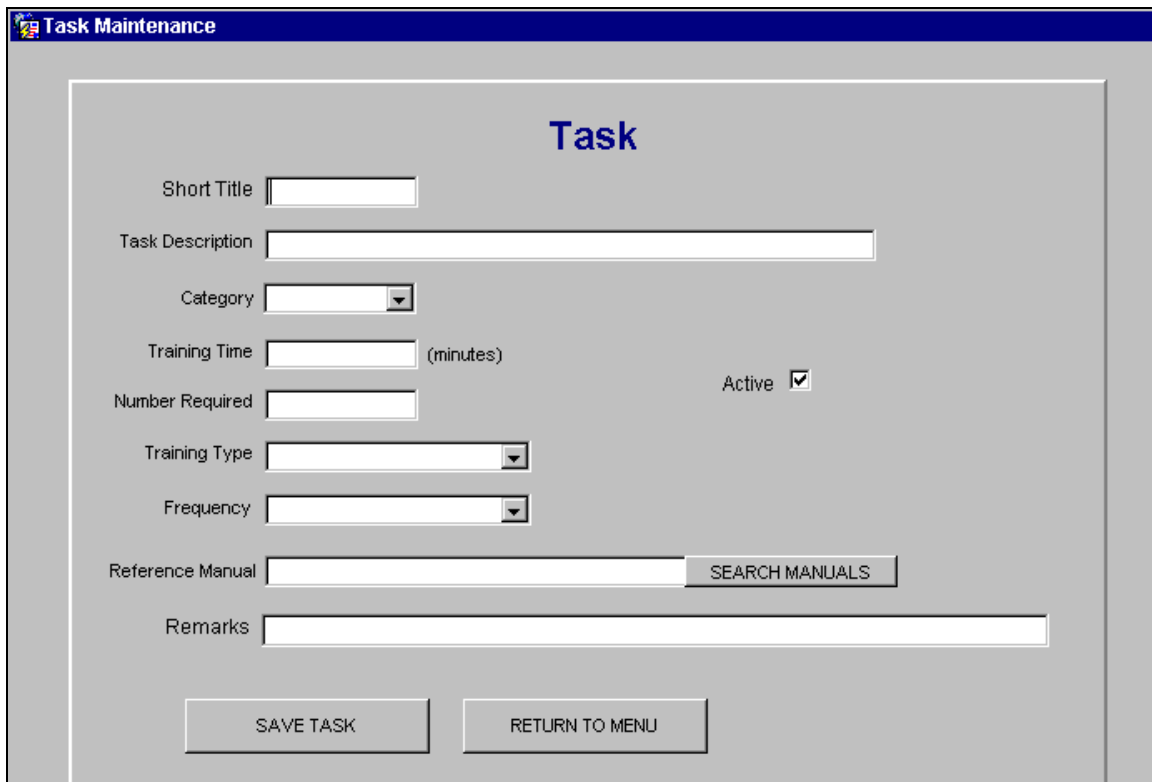
10.6.1 Enter a New Task

Perform the following steps to enter a new task:

Step 1: From the TMT Main Menu, click the **TASK CAPTURE** button.

Step 2: Click the **ENTER NEW TASK** button.

The Task screen appears, similar to the following:

Figure 10-21 Task Screen

Step 3: Enter the required information by using the list boxes when available. Press the **TAB** key after each entry. Click **Save Task**.

The Task Maintenance screen appears and the task is entered and saved.

10.6.2 Update a Task

Perform the following steps to update a task:

Step 1: From the TMT Main Menu, click the [TASK CAPTURE] button.

Step 2: Select the desired task to be updated. Click the [UPDATE/DELETE] button.

> *The Task screen appears with the task information listed.*

Step 3: Enter the current information and click the [SAVE TASK] button.

> *The Task information is entered and saved. The Task Maintenance screen appears.*

10.6.3 Delete a Task

Perform the following steps to delete a task:

Step 1: From the TMT Main Menu, click the [TASK CAPTURE] button.

Step 2: Select the desired task to be deleted. Click the [UPDATE/DELETE] button.

> *The Task screen appears with the task information listed.*

Step 3: Enter the current information and click the [DELETE TASK] button.

> *The Task information is deleted and the Task Maintenance screen appears.*

10.7 Competency Maintenance

The **Competency Maintenance** button allows you to insert, update, and delete active and inactive competencies for your unit and/or subordinate units and return to the TMT Main Menu. Perform the following step:

Step 1: From the TMT Main Menu, click the [COMPETENCY Maintenance] button.

The Competency Maintenance screen appears, similar to the following:

Figure 10-22 Competency Maintenance Screen

Step 2: Proceed to the following sections for instructions on performing the various duties in Competency Task Maintenance.

10.7.1 Enter a New Competency

Perform the following steps to enter a new competency:

Step 1: From the TMT Main Menu, click the [COMPETENCY Maintenance] button.

> *The Competency Maintenance screen appears.*

Step 2: Click the [ENTER NEW COMPETENCY] button.

> *The Competency screen appears, similar to the following:*
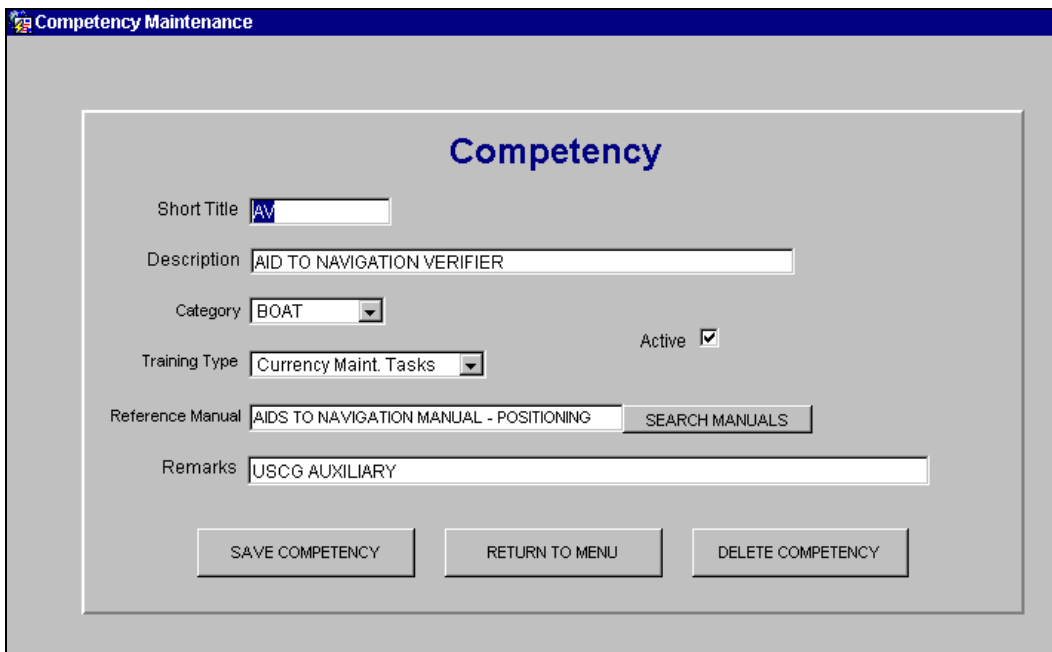
Figure 10-23 Competency Screen

Step 3: Enter the required information by using the list boxes when available. Press the **TAB** key after each entry to move to the next text box. Click **Save Task**.

> *The Competency Maintenance screen appears and the competency is entered and saved.*

10.7.2 Update a Competency

Perform the following steps to update a competency:

Step 1: From the TMT Main Menu, click the [COMPETENCY Maintenance] button.

> *The Competency Maintenance screen appears.*

Step 2: Select the desired competency to be updated. Click the [UPDATE/DELETE] button.

The Competency screen appears with the competency information listed.

Step 3: Enter the current information and click the [SAVE COMPETENCY] button.

The Competency information is entered and saved. The Competency Maintenance screen appears.

10.7.3 Delete a Competency

Perform the following steps to delete a competency:

Step 1: From the TMT Main Menu, click the [COMPETENCY Maintenance] button.

The Competency Maintenance screen appears.

Step 2: Select the desired competency to be deleted. Click the [UPDATE/DELETE] button.

The Competency screen appears with the task information listed.

Step 3: Enter the current information and click the [DELETE COMPETENCY] button.

The Competency information is deleted and the Competency Maintenance screen appears.

10.8 Reports

The **Reports** button takes you to the TMT Report menu, where you can run reports on either individuals and/or units for the following: Training Status, Training Record, and Certifications. Perform the following step to access the TMT Reports menu:

Step 1: From the TMT Main Menu, click the [REPORTS] button.

A Reports menu appears:
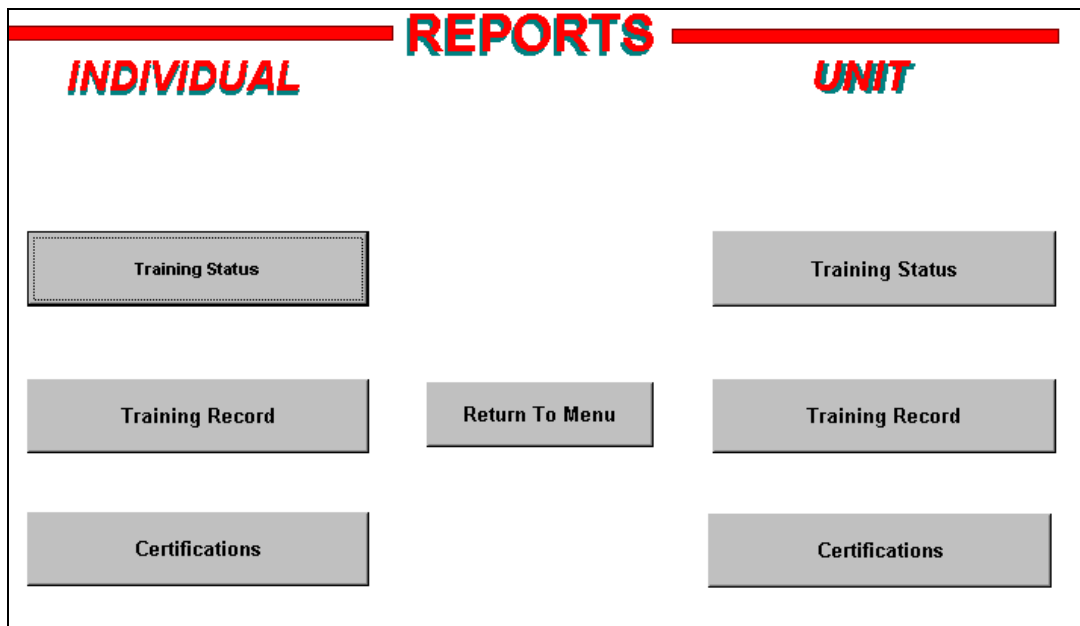
Figure 10-24 Reports Menu

10.8.1 Individual Training Status Report

Run an Individual Training Status report to retrieve an individual's training status. Perform the following steps to run this report:

Step 1: From the TMT Main Menu, click the [REPORTS] button.

The Reports menu appears.

Step 2: Click the

button under Individual.

The Individual Training Status parameter screen appears:

Figure 10-25 Individual Training Status Parameter Screen

Step 3: Use either the **Search By Emp ID** or the **Search By Name** button to enter the individual's name in the **Name** field. These buttons activate a list of values dialog box from which the individual's name is selected.

The name appears in the text box.

Step 4: Use the [Calendar] button to define the Date in Cycle for the report.

Step 5: Click the **Submit** button.

The Training Status Individual report appears similar to the following:

Figure 10-26 Training Status Individual Report Screen

NOTE: *This report lists tasks by competency, and a color-coding scheme is used to indicate the status of all listed tasks. Green text indicates the task's requirements have been completed for the current cycle. Black text indicates the task's requirements have been completed for the previous cycle, but the requirements for the current cycle are not yet complete. Red text indicates that the task's requirements have not been completed for either the current or previous cycle. The Cycle field indicates if the currency of a task is based on the January 1 calendar year or based on a sliding scale, which means the due date is based on the date the task was last completed. (C) indicates the currency is based on the calendar years, and (S) indicates the currency is based on a sliding scale.*

Step 6: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ☒ at the upper right-hand corner of the window.

The window closes and the Individual Training Status Screen appears.

10.8.2 Individual Training Record Report

Run an Individual Training Record report to retrieve an individual's training record within a defined period. Perform the following steps to run this report:

Step 1: From the TMT Main Menu, click the **REPORTS** button.

The Reports menu appears.

Step 2: Click the [Training Record] button under Individual.

The Individual Training Record Criteria screen appears:

Figure 10-27 Individual Training Record Criteria Screen

Step 3: User either the **Search By Emp ID** or the **Search By Name** button to enter the individual's name in the **Name** field. These buttons activate a list of values dialog box from which the individual's name is selected.
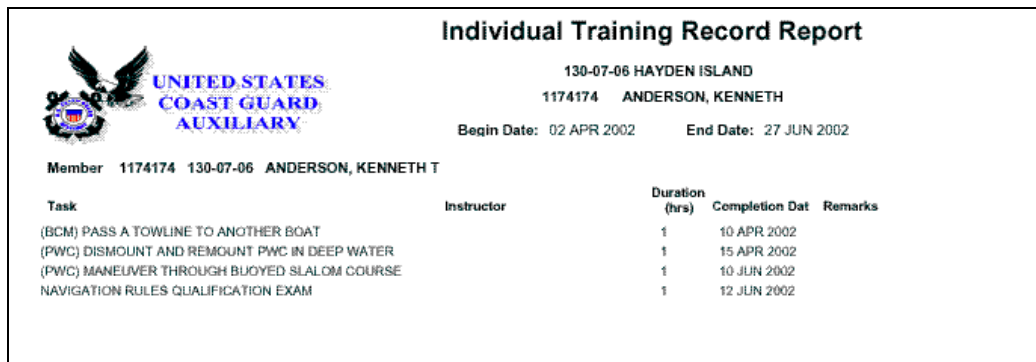
The name appears in the text box.

Step 4: Use the [Calendar] buttons to define a Begin Date and End Date for the report.

The selected dates appear in the text boxs.

Step 5: Click the **Submit** button.

The Individual Training Record report appears, similar to the following:

Figure 10-28 Individual Training Record Report Screen

Step 6: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ☒ at the upper right-hand corner of the window.
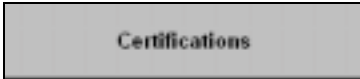
The window closes and the Individual Training Record Criteria screen appears.

10.8.3 Individual Certifications Report

Run an Individual Certifications report to retrieve a list of certified and non-certified competencies associated with an individual. Perform the following steps to run this report:

Step 1: From the TMT Main Menu, click the [REPORTS] button.

The TMT Reports menu appears.

Step 2: Click the [Certifications] button under Individual.

The Individual Certifications Report Criteria screen appears:
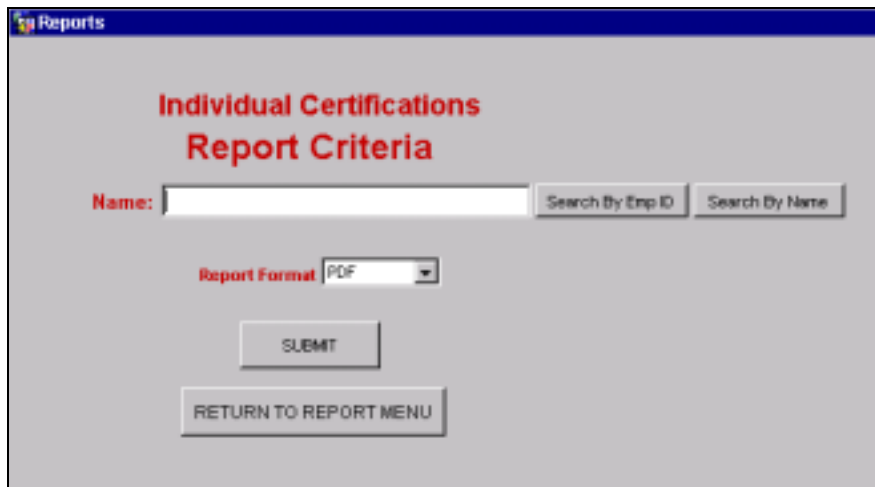
Figure 10-29 Individual Certifications Report Criteria Screen

Step 3: User either the **Search By Emp ID** or the **Search By Name** button to enter the individual's name in the **Name** field. These buttons activate a list of values dialog box from which the individual's name is selected.

Step 4: Click the **Submit** button.

The Individual Certifications report appears, similar to the following:

Figure 10-30 Individual Certifications Report

Step 4: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ⊠ at the upper right-hand corner of the window.

The window closes and the Individual Certification Criteria screen appears.

10.8.4 Unit Training Status Report

Run a Unit Training Status report to retrieve the training status of all individuals at a unit. Subunits may also be included in the report. Perform the following steps to run this report:

Step 1: From the TMT Main Menu, click the [REPORTS] button.

The Reports menu appears.

Step 2: Click the [Training Status] button under Unit.

The Unit Training Status Criteria screen appears:

Figure 10-31 Unit Training Report Criteria Screen

Step 3: Click the [▼] button and, from the drop down list, select the unit that you wish to run the report on. You also have the option to include all sub units in the report.

The name appears in the text box.

Step 4: Use the [Calendar] button to define the Date in Cycle for the report.

Step 5: Click the **Submit** button.

The Training Status Unit Report appears, similar to the following:

Figure 10-32 Training Status Unit Report Screen

NOTE: *This report lists tasks by competency, and a color-coding scheme is used to indicate the status of all listed tasks. Green text indicates the task's requirements have been completed for the current cycle. Black text indicates the task's requirements have been completed for the previous cycle, but the requirements for the current cycle are not yet complete. Red text indicates that the task's requirements have not been completed for either the current or previous cycle. The Cycle field indicates if the currency of a task is based on the January 1 calendar year or based on a sliding scale, which means the due date is based on the date the task was last completed. (C) indicates the currency is based on the calendar years, and (S) indicates the currency is based on a sliding scale.*

Step 6: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ⊠ at the upper right-hand corner of the window.

The window closes and the Unit Training Status Criteria screen appears.

10.8.5 Unit Training Record Report

Run the Unit Training Report to retrieve training records for individuals in a unit within a defined period. Subunits may also be included in the report. Perform the following steps to run a this report:

Step 1: From the TMT Main Menu, click the [REPORTS] button.

The Reports menu appears.

Step 2: Click the [Training Record] button under Unit.

The Unit Training Record Report Criteria screen appears:

Figure 10-33 Unit Training Record Criteria Screen

Step 3: Click the button and, from the drop down list, select the unit that you wish to run the report on. You also have the option to include all sub units in the report.

Step 4: Use the [Calendar] buttons to define a Begin Date and End Date for the report.

Step 5: Click the **Submit** button.

The Unit Training Record Report appears, similar to the following:

Figure 10-34 Unit Training Record Report

Step 6: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ☒ at the upper right-hand corner of the window.

The window closes and the Unit Training Record Criteria screen appears.

10.8.6 Unit Certifications Report

Run a Unit Certifications report to retrieve a record of certified and non-certified competencies associated with individuals at a unit. Subunits may also be included in the report. Perform the following steps to run this report:

Step 1: From the TMT Main Menu, click the **REPORTS** button.

The Reports menu appears.

Step 2: Click the **Certifications** button under Unit.

The Unit Certifications Report Criteria Screen appears:

Figure 10-35 Unit Certifications Report Criteria Screen

Step 3: Click the [▼] button and, from the drop down list, select the unit that you wish to run the report on. You also have the option to include all sub units in the report.

Step 4: Click the **Submit** button.

The Unit Certifications report appears, similar to the following:

Figure 10-36 Unit Certifications Screen

Step 5: Once you have done what you wish with the report (for example, printing, saving to disk for later use), close the report by clicking the ☒ at the upper right-hand corner of the window.

The window closes and the Unit Certifications Criteria screen appears.

APPENDIX A
ACTIVITY LOGS BUTTON FLOW CHARTS

ATON PATROL (BOAT)

```
ACTIVITY LOG
     │
     ▼
  RESOURCES ──────────▶  ┌─────────────┐      Select facility by clicking on it. Selected
     │                   │  PICK LIST  │      facility is highlighted is blue
     │                   ├─────────────┤
     │                   │   SELECT    │
     │◀──────────────────│  RESOURCE   │
     │                   └─────────────┘
     ▼
  START TIME ──────────▶ ┌─────────────┐      Enter MISSION START Date-Time-Group (DTG)
     │                   │ ENTER TIME/ │      Format is DD HHMI MON YYYY
     │                   │ DATE PER    │      Example: 8 February 2002 at 0920 would be
     │◀──────────────────│ FORMAT SHOWN│      entered as 08 0920 FEB 2002
     │                   └─────────────┘
     ▼
  ACTIVITY ───────────▶  ┌─────────────┐
     │                   │  PICK LIST  │
     │                   ├─────────────┤
     │◀──────────────────│    U/W      │      U/W = Underway
     │                   └─────────────┘
     ▼
  STATUS ─────────────▶  ┌─────────────┐
     │                   │  PICK LIST  │
     │                   ├─────────────┤
     │◀──────────────────│     A       │      A = ALPHA
     │                   └─────────────┘
     ▼
  SUB-ACTIVITY ───────▶  ┌─────────────┐
     │                   │  PICK LIST  │
     │                   ├─────────────┤
     │◀──────────────────│    OPS      │      OPS = Operations
     │                   └─────────────┘
     ▼
  MISSION ────────────▶  ┌─────────────┐
     │                   │  PICK LIST  │
     │                   ├─────────────┤
     │◀──────────────────│   ATON      │      ATON Patrol
     │                   └─────────────┘
     ▼
  SUB-MISSIONS ───────▶  ┌─────────────┐      Choices are:
     │                   │  PICK LIST  │      BRIDGE - Bridge Administration
     │                   ├─────────────┤      FEDERAL - Federal Aids to Navigation
     │◀──────────────────│  FEDERAL    │      PRIVATE - Private Aids to Navigation
     │                   └─────────────┘
     ▼
  OPERATION ──────────▶  ┌─────────────┐                 ┌─────────────┐
     │                   │  PICK LIST  │                 │   GO TO     │
     │                   ├─────────────┤                 ├─────────────┤
     │◀──────────────────│ AS DIRECTED │                 │ ACTIVITY LOG│
     │                   └─────────────┘                 │  DETAILS    │
     ▼                                                   └─────────────┘
  OPCON ──────────────▶  ┌─────────────┐                        ▲
                         │  PICK LIST  │                 ┌──────┴──────┐
                         ├─────────────┤                 │             │
                         │  DISTRICT   │────────────────▶│    SAVE     │
                         │  NUMBER     │                 │             │
                         └─────────────┘                 └─────────────┘
```

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ATON PATROL (BOAT)

ACTVITY LOG DETAILS → ENTER

MISSION DETAILS

LOCATION
ASSISTS
PATROL STATUS
WATERS

↓

SAVE

CREW ASSIGNMENTS → PICK LIST

SELECT CREW MEMBERS

Select crew members by highlighting their names.
HINT: Use "Search for Person" by typing their last name only in the window.

↓

ACTION

MOVE SELECTED CREW MEMBERS FROM LEFT TO RIGHT

Use the > button to move selected crew members from left to right.
HINT: Do not use the >> button which moves every one to the right

↓

ACTION

SELECT CREW POSITIONS

Click on the ▼ key and select appropriate position, i.e. coxswain, boat crew member, etc. for each crew member selected

↓

SAVE

TASKS → SELECT TASKS

AS APPROPRIATE → TASK CAPTURE

GO TO PAGE 3

Select only if training occurred. Otherwise skip and go to Activity Logs, page 3

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ATON PATROL (BOAT)

TASK CAPTURE → **ACTION**

INSTRUCTOR
DURATION IN HOURS
DATE COMPLETED
REMARKS

Enter the name of the instructor.
Enter duration in whole hours.
Enter date completed.
Enter any remarks

ACTION

MOVE ELIGIBLE TO
PARTICIPATE
FROM LEFT TO RIGHT

ENTER GRADE

Highlight eligible members and move them
to the right.

SAVE

ACTIVITY LOGS → **ACTION**

COPY WITH
CREW

START TIME → ENTER TIME/DATE
PER FORMAT
SHOWN

Enter **MISSION END** Date-Time-Group (DTG)
Format is DD HHMI MON YYYY
Example: 8 February 2002 at 0920 would be
entered as 08 0920 FEB 2002

ACTIVITY → **PICK LIST**

EOM

EOM = End of Mission

STATUS → **PICK LIST**

C → Sub-Activity

C = CHARLEY   GO TO PAGE 4

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ATON PATROL (BOAT)

```
            ┌──────────────┐
SUB-ACTIVITY │→│  PICK LIST   │        EOM = End of Mission
            ├──────────────┤
            │     EOM      │
            └──────────────┘

            ┌──────────────┐
  MISSION   │→│  PICK LIST   │
            ├──────────────┤
            │  NO ENTRY    │
            │  REQUIRED    │
            └──────────────┘

            ┌──────────────┐
SUB-MISSIONS │→│  PICK LIST   │
            ├──────────────┤
            │  NO ENTRY    │
            │  REQUIRED    │
            └──────────────┘

            ┌──────────────┐
 OPERATION  │→│  PICK LIST   │
            ├──────────────┤
            │  AS DIRECTED │
            └──────────────┘

            ┌──────────────┐
  OPCON     │→│  PICK LIST   │
            ├──────────────┤
            │   DISTRICT   │
            │    NUMBER    │
            └──────────────┘

            ┌──────────────┐
            │     SAVE     │
            └──────────────┘

            ┌──────────────┐
            │   APPROVALS  │
            └──────────────┘
```

Highlight the mission shown in the"Unapproved Activities" window you want to approve by clicking on the appropriate line. Remember to highlight both the START MISSION line as well as the END OF MISSION line.

Click on UP and the mission is moved to the "Approved Activities" window.

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PUBLIC EDUCATION (PE)

```
ACTIVITY LOG
     │
     ▼
RESOURCES ──────────▶ ┌─────────────┐     Select the unit reporting
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │    UNIT     │
     │                └─────────────┘
     ▼
START TIME ─────────▶ ┌─────────────┐     Enter MISSION START Date-Time-Group (DTG)
     │                │ENTER TIME/DATE│    Format is DD HHMI MON YYYY
     │                │ PER FORMAT  │     Example: 8 February 2002 at 0920 would be
     │                │   SHOWN     │     entered as 08 0920 FEB 2002
     ▼                └─────────────┘
ACTIVITY ───────────▶ ┌─────────────┐
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │    UPE      │     UPE = Conduct Public Education course
     ▼                └─────────────┘
STATUS ─────────────▶ ┌─────────────┐
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │     A       │     A = ALPHA
     ▼                └─────────────┘
SUB-ACTIVITY ───────▶ ┌─────────────┐
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │    UPE      │     UPE = Conduct Public Education course
     ▼                └─────────────┘
MISSION ────────────▶ ┌─────────────┐
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │    UPE      │     UPE = Conduct Public Education course (04)
     ▼                └─────────────┘
SUB-MISSIONS ───────▶ ┌─────────────┐
     │                │  PICK LIST  │
     │                ├─────────────┤
     │                │   ENTER     │
     │                │ COURSE CODE │     For COURSE CODE see listing on page 3
     ▼                └─────────────┘
OPERATION ──────────▶ ┌─────────────┐      ┌─────────────┐
     │                │  PICK LIST  │      │   GO TO     │
     │                ├─────────────┤      ├─────────────┤
     │                │ AS DIRECTED │      │ ACTIVITY LOG│
     ▼                └─────────────┘      │  DETAILS    │
OPCON ──────────────▶ ┌─────────────┐      └─────────────┘
                      │  PICK LIST  │            ▲
                      ├─────────────┤      ┌─────────────┐
                      │  DISTRICT   │─────▶│    SAVE     │
                      │  NUMBER     │      └─────────────┘
                      └─────────────┘
```

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PUBLIC EDUCATION (PE)

ACTVITY LOG DETAILS → ENTER — See Note 1 on page 3

SAVE

CREW ASSIGNMENT → PICK LIST — SELECT CREW MEMBERS

Select crew members by highlighting their names.
HINT: Use "Search for Person" by typing their last name only in the window.

ACTION — MOVE SELECTED CREW MEMBERS FROM LEFT TO RIGHT

Use the > button to move selected crew members from left to right.
HINT: Do not use the >> button which moves every one to the right

ACTION — SELECT CREW POSITIONS

Click on the ▼ key and select appropriate position, i.e. INSTRUCTOR, ASSISTANT INSTRUCTOR, etc for each crew member selected

SAVE

TASKS → DOES NOT APPLY TO PE → APPROVALS

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PUBLIC EDUCATION (PE)

Public Education Course Codes:

B10L	Boating Skills and Seamanship (10 to13-L)
B13L	Boating Skills and Seamanship (13-L)
B6L	Boating Skills and Seamanship (6-L Core)
B7L	Boating Skills and Seamanship (7 to 9-L)
BCN	Basic Coastal Navigation (8-L)
BSC	Boating Safely (4-L)
ACN	Advanced Coastal Navigation (14-L)
NBA	National Board Authorized 1 Lesson (1-L)
OWT	On The Water Training
PEABC	Americas Boating Course
PEBF	Boating Fun
PEGPS	Global Positioning System
PESF	Sailing Fundamentals
PEWE	Waypoints Course
PWC	Personal Watercraft Course
STATE	State Boating Course
SAILING	Let's Go Sailing

Note 1: Public Education Details:

Public Education Details are entered only at the last class session of the course being taught. But do enter the number of HOURS taught after every class session for the duration of the course.

Number of Enrollees
Total Number of Graduates
State Boating Course
Total Number of Enrollees 17 and under
Total Number of Graduates 17 and under
State Class Taught in (Two letter abrevation of the State)
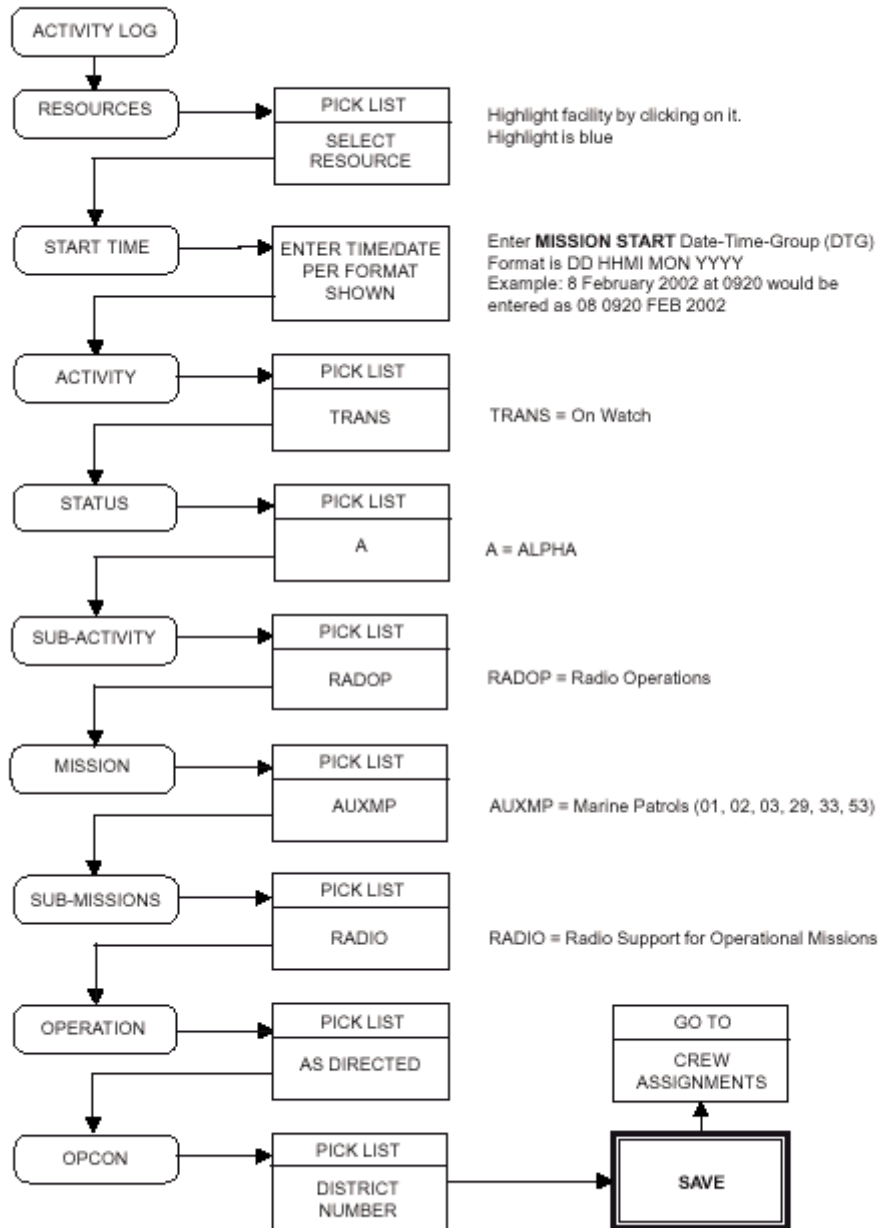
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RADIO MISSION - MARINE PATROL (RADIO)

```
ACTIVITY LOG
     │
     ▼
 RESOURCES ──────────▶  PICK LIST          Highlight facility by clicking on it.
     │                  ───────────        Highlight is blue
     │                  SELECT
     │◀─────────────    RESOURCE
     ▼
 START TIME ─────────▶  ENTER TIME/DATE    Enter MISSION START Date-Time-Group (DTG)
     │                  PER FORMAT         Format is DD HHMI MON YYYY
     │                  SHOWN              Example: 8 February 2002 at 0920 would be
     │◀─────────────                       entered as 08 0920 FEB 2002
     ▼
 ACTIVITY ───────────▶  PICK LIST
     │                  ───────────
     │                  TRANS              TRANS = On Watch
     │◀─────────────
     ▼
 STATUS ─────────────▶  PICK LIST
     │                  ───────────
     │                  A                  A = ALPHA
     │◀─────────────
     ▼
 SUB-ACTIVITY ───────▶  PICK LIST
     │                  ───────────
     │                  RADOP              RADOP = Radio Operations
     │◀─────────────
     ▼
 MISSION ────────────▶  PICK LIST
     │                  ───────────
     │                  AUXMP              AUXMP = Marine Patrols (01, 02, 03, 29, 33, 53)
     │◀─────────────
     ▼
 SUB-MISSIONS ───────▶  PICK LIST
     │                  ───────────
     │                  RADIO              RADIO = Radio Support for Operational Missions
     │◀─────────────
     ▼
 OPERATION ──────────▶  PICK LIST                        GO TO
     │                  ───────────                      ───────────
     │                  AS DIRECTED                      CREW
     │◀─────────────                                     ASSIGNMENTS
     ▼                                                      ▲
 OPCON ──────────────▶  PICK LIST                           │
                        ───────────                    ┌──────────┐
                        DISTRICT ──────────────────────▶   SAVE   │
                        NUMBER                         └──────────┘
```

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RADIO MISSION (RADIO)

```
CREW              ─────▶   PICK LIST          Select crew members by highlighting their names.
ASSIGNMENTS                                   HINT: Use "Search for Person" by typing their last
                           SELECT CREW        name only in the window.
                           MEMBERS
                             │
                             ▼
                           ACTION             Use the > button to move selected crew members
                                              from left to right.
                           MOVE SELECTED      HINT: Do not use the >> button which moves
                           CREW MEMBERS       every one to the right
                           FROM LEFT TO
                           RIGHT
                             │
                             ▼
                           ACTION             Click on the ▼ key and select NOT APPLICABLE
                                              (only choice)
                           SELECT
                           CREW POSITIONS
                             │
                             ▼
                           ╔═══════════╗
                           ║   SAVE    ║
                           ╚═══════════╝

ACTIVITY LOGS     ─────▶   ACTION

                           COPY WITH
                           CREW

END OF            ─────▶   ENTER TIME/DATE    Enter MISSION END Date-Time-Group (DTG).
MISSION TIME               PER FORMAT         Format is DD HHMI MON YYYY
                           SHOWN

ACTIVITY          ─────▶   PICK LIST

                           END OF MISSION
                           EOM

STATUS            ─────▶   PICK LIST

                           C  CHARLIE   ─────▶   SUB-ACTIVITY

                                                 GO TO PAGE 3
```

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RADIO MISSION (RADIO)

```
SUB-ACTIVITY ──────────▶  PICK LIST
                          END OF MISSION
                          EOM
                 │
                 ▼
MISSION ──────────────▶    PICK LIST
                          NO ENTRY
                          REQUIRED
                 │
                 ▼
SUB-MISSIONS ─────────▶    PICK LIST
                          NO ENTRY
                          REQUIRED
                 │
                 ▼
OPERATION ────────────▶    PICK LIST
                          AS DIRECTED
                 │
                 ▼
OPCON ────────────────▶    PICK LIST
                          DISTRICT
                          NUMBER
                          │
                          ▼
                        SAVE
                          │
                          ▼
                      APPROVALS
```

Highlight the mission shown in the "Unapproved Activities" window you want to approve by clicking on the appropriate line. Remember to highlight both the START MISSION line as well as the END OF MIS-SION line.

Click on UP and the mission is moved to the "Approved Activities" window.

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SAFETY PATROL (BOAT)

```
ACTIVITY LOG
     |
     v
RESOURCES  ------>  PICK LIST        Select facility by clicking on it. Selected
                   -----------       facility is highlighted is blue
                   SELECT
                   RESOURCE
     |
     v
START TIME ------>  ENTER TIME/DATE   Enter MISSION START Date-Time-Group (DTG)
                   PER FORMAT         Format is DD HHMI MON YYYY
                   SHOWN              Example: 8 February 2002 at 0920 would be
                                      entered as 08 0920 FEB 2002
     |
     v
ACTIVITY  ------>   PICK LIST
                   -----------
                   U/W               U/W = Underway
     |
     v
STATUS    ------>   PICK LIST
                   -----------
                   A                 A = ALPHA
     |
     v
SUB-ACTIVITY ---->  PICK LIST
                   -----------
                   OPS               OPS = Operations
     |
     v
MISSION   ------>   PICK LIST
                   -----------
                   AUXMP             AUXMP = Auxiliary Marine Patroll
     |
     v
SUB-MISSIONS --->   PICK LIST
                   -----------
                   SAFETY
     |
     v
OPERATION ------>   PICK LIST                   GO TO
                   -----------               -----------
                   AS DIRECTED               ACTIVITY LOG
                                             DETAILS
     |                                           ^
     v                                           |
OPCON     ------>   PICK LIST
                   -----------                -----------
                   DISTRICT    ------>         SAVE
                   NUMBER
```

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SAFETY PATROL (BOAT)

ACTVITY LOG DETAILS → ENTER

MISSION DETAILS

LOCATION
ASSISTS
PATROL STATUS
WATERS

↓

SAVE

↓

CREW ASSIGNMENTS → PICK LIST

SELECT CREW MEMBERS

Select crew members by highlighting their names.
HINT: Use "Search for Person" by typing their last name only in the window.

↓

ACTION

MOVE SELECTED CREW MEMBERS FROM LEFT TO RIGHT

Use the > button to move selected crew members from left to right.
HINT: Do not use the >> button which moves every one to the right

↓

ACTION

SELECT CREW POSITIONS

Click on the ▼ key and select appropriate position, i.e. coxswain, boat crew member, etc. for each crew member selected

↓

SAVE

↓

TASKS → SELECT TASKS

AS APPROPRIATE → TASK CAPTURE

Select only if training oc-curred. Otherwise skip and go to Activity Logs, page 3

GO TO PAGE 3

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SAFETY PATROL (BOAT)

TASK CAPTURE →

ACTION

INSTRUCTOR
DURATION IN HOURS
DATE COMPLETED
REMARKS

Enter the name of the instructor.
Enter duration in whole hours.
Enter date completed.
Enter any remarks

↓

ACTION

MOVE ELIGIBLE TO
PARTICIPATE
FROM LEFT TO RIGHT

ENTER GRADE

Highlight eligible members and move them
to the right.

↓

SAVE

ACTIVITY LOGS →

ACTION

COPY WITH
CREW

↓

START TIME →

ENTER TIME/DATE
PER FORMAT
SHOWN

Enter **MISSION END** Date-Time-Group (DTG)
Format is DD HHMI MON YYYY
Example: 8 February 2002 at 0920 would be
entered as 08 0920 FEB 2002

↓

ACTIVITY →

PICK LIST

EOM

EOM = End of Mission

↓

STATUS →

PICK LIST

C

→ **Sub-Activity**

C = CHARLEY

GO TO PAGE 4

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ATON PATROL (BOAT)

SUB-ACTIVITY → PICK LIST / EOM   EOM = End of Mission

MISSION → PICK LIST / NO ENTRY REQUIRED

SUB-MISSIONS → PICK LIST / NO ENTRY REQUIRED

OPERATION → PICK LIST / AS DIRECTED

OPCON → PICK LIST / DISTRICT NUMBER

SAVE
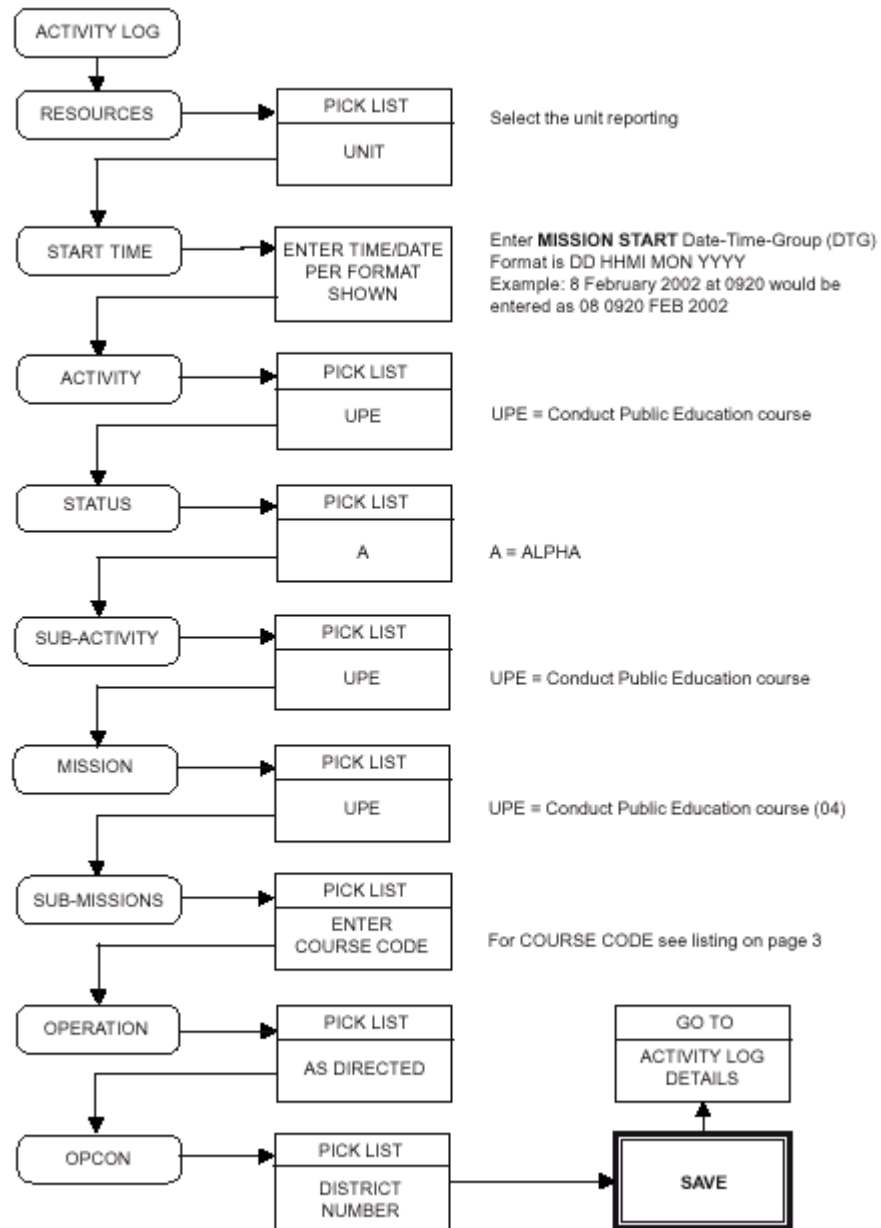
APPROVALS

Highlight the mission shown in the"Unapproved Activities" window you want to approve by clicking on the appropriate line. Remember to highlight both the START MISSION line as well as the END OF MISSION line.

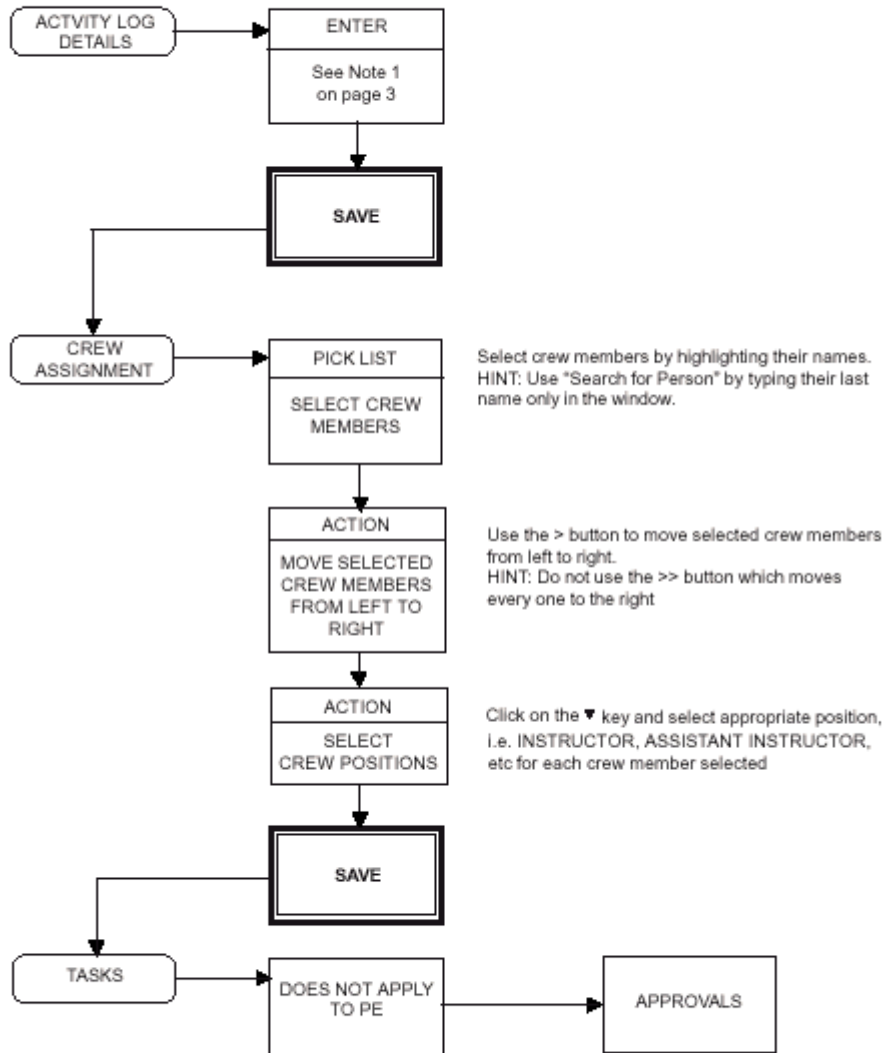Click on UP and the mission is moved to the "Approved Activities" window.

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VESSEL SAFETY CHECK (VSC)

ACTIVITY LOG

RESOURCES → PICK LIST / UNIT

NOTE: For a complete listing of the "Pick Lists" go to Table XX in this document or "List of Values" on the screen.

START/STOP TIME → ENTER TIME/DATE PER FORMAT SHOWN

ACTIVITY → PICK LIST / UAAS UNIT ADM

STATUS → PICK LIST / A ALPHA

SUB-ACTIVITY → PICK LIST / UAAS UNIT ADM

MISSION → PICK LIST / VSC

SUB-MISSIONS → PICK LIST / PB PRIVATE BOAT

OPERATION → PICK LIST

OPCON → PICK LIST / DISTRICT NUMBER

VESSEL SAFETY CHECK (VSC) cont.

```
  ┌─────────────────┐
  │  ACTVITY LOG    │
  │    DETAILS      │
  └─────────────────┘
          │
          ▼
  ┌─────────────────┐        ┌──────────────────┐
  │ CREW ASSIGN-    │───────▶│    PICK LIST     │
  │   MENTS         │        ├──────────────────┤
  └─────────────────┘        │  SELECT CREW     │
                             │    MEMBERS       │
                             └──────────────────┘
                                      │
                                      ▼
                             ┌──────────────────┐
                             │     ACTION       │
                             ├──────────────────┤
                             │ MOVE SELECTED    │
                             │ CREW MEMBERS     │
                             │ FROM LEFT TO     │
                             │    RIGHT         │
                             └──────────────────┘
                                      │
                                      ▼
                             ┌──────────────────┐
                             │     ACTION       │
                             ├──────────────────┤
                             │    SELECT        │
                             │ CREW POSITIONS   │
                             └──────────────────┘
                    ┌─────────────────┘
                    ▼
  ┌─────────────────┐        ┌──────────────────┐         ┌──────────────────┐
  │     TASKS       │───────▶│ DOES NOT APPLY   │────────▶│  GO TO ACTIVITY  │
  │                 │        │   FOR VFCs       │         │     LOGS         │
  └─────────────────┘        └──────────────────┘         └──────────────────┘
```

APPENDIX B

PRINTING REPORTS THROUGH

THE CITRIX SERVER

To help your users with printing reports when connected through the CITRIX server (**Internet Users: Production Database**), please let them know that they can save the file to their local (client) disk drive by following the instructions below.
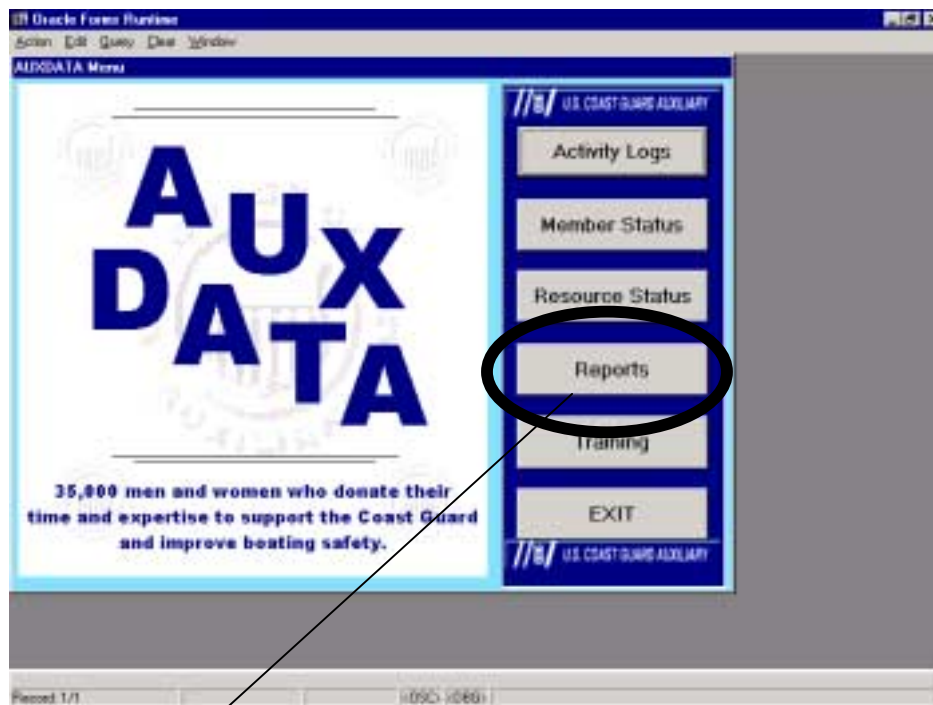
Select the reports button…

Select Email Directory….
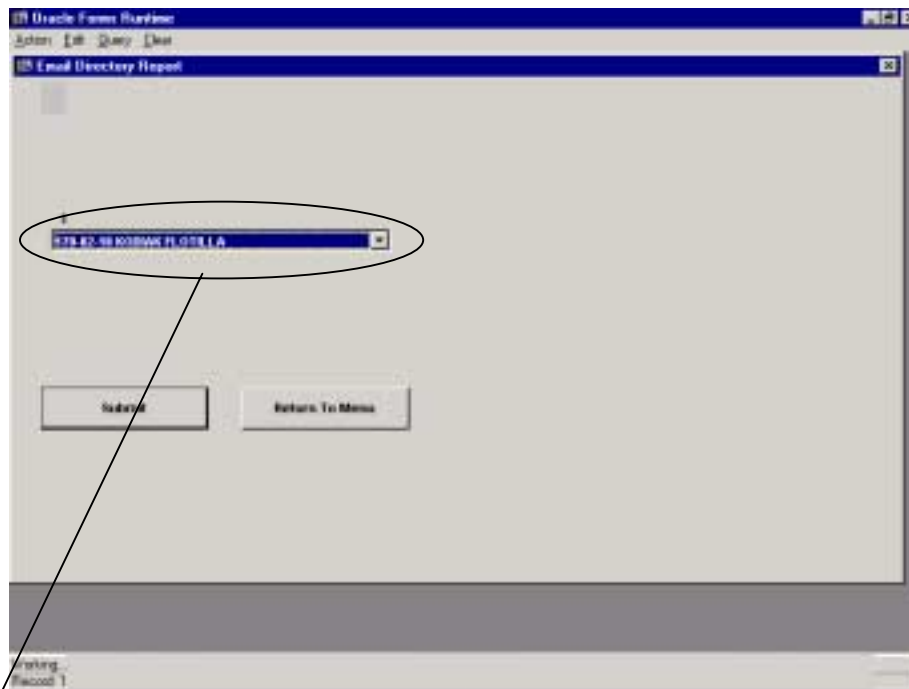
Select the appropriate flotilla…

Select "Generate to File", then appropriate type

Select "Full Access"

Select appropriate locations on CLIENT workstation…do **not select** LOCAL

Save to the appropriate Client location

E-MAIL DIRECTORY

170-02-10 KODIAK FLOTILLA

SMITH@PTIALASKA.NET>
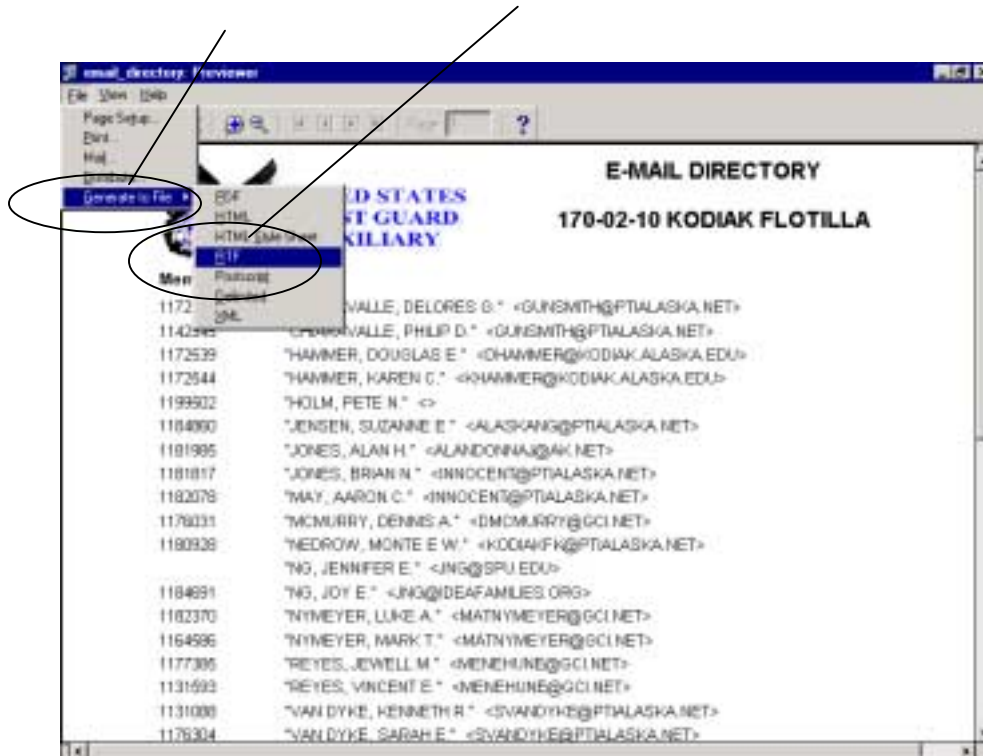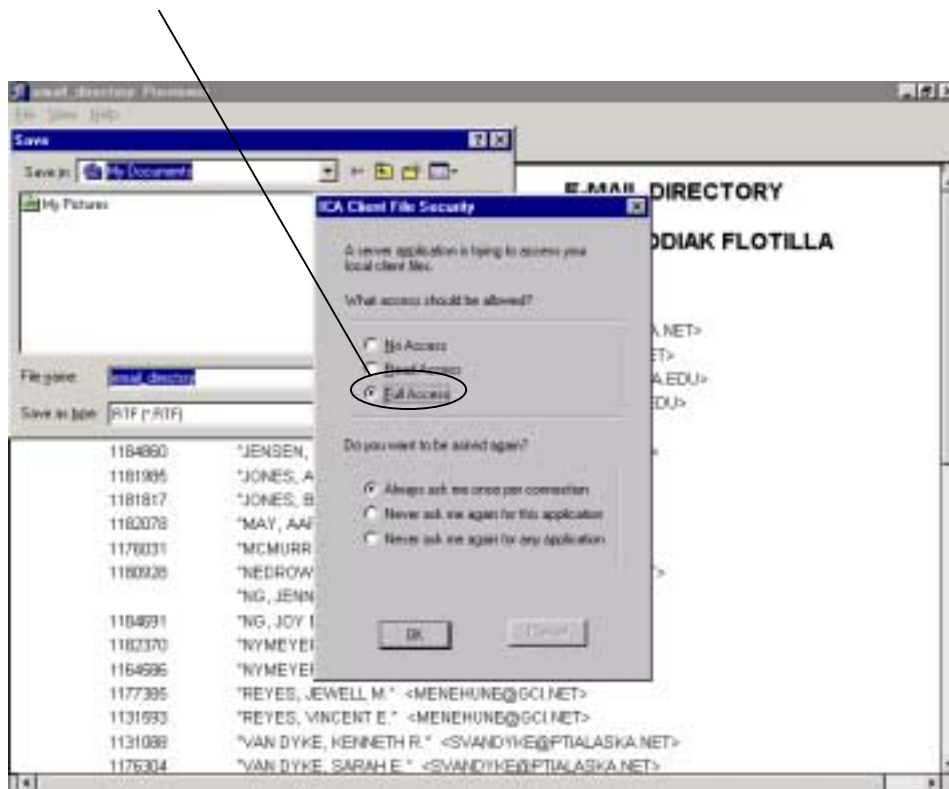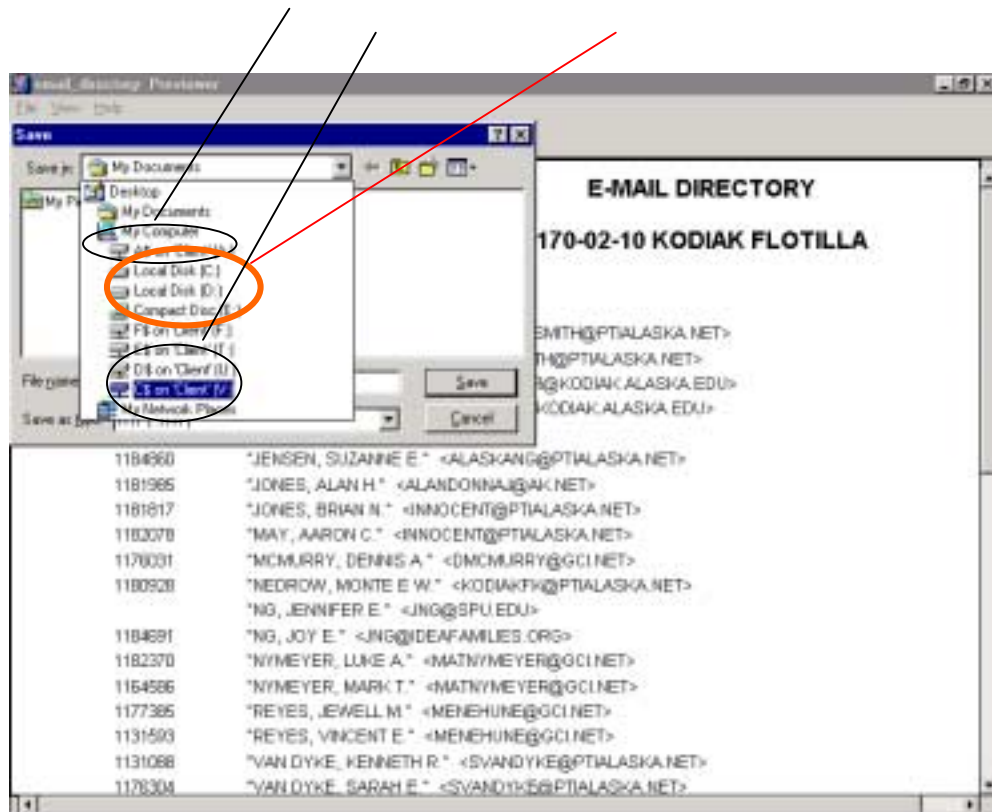TH@PTIALASKA.NET>
R@KODIAK.ALASKA.EDU>
KODIAK.ALASKA.EDU>

1184860	"JENSEN, SUZANNE E." <ALASKANG@PTIALASKA.NET>
1181985	"JONES, ALAN H." <ALANDONNAJ@AK.NET>
1181817	"JONES, BRIAN N." <INNOCENT@PTIALASKA.NET>
1182078	"MAY, AARON C." <INNOCENT@PTIALASKA.NET>
1176031	"MCMURRY, DENNIS A." <DMCMURRY@GCI.NET>
1180928	"NEDROW, MONTE E W." <KODIAKFK@PTIALASKA.NET>
	"NG, JENNIFER E." <JNG@SPU.EDU>
1184691	"NG, JOY E." <JNG@IDEAFAMILIES.ORG>
1182370	"NYMEYER, LUKE A." <MATNYMEYER@GCI.NET>
1164586	"NYMEYER, MARK T." <MATNYMEYER@GCI.NET>
1177385	"REYES, JEWELL M." <MENEHUNE@GCI.NET>
1131593	"REYES, VINCENT E." <MENEHUNE@GCI.NET>
1131088	"VAN DYKE, KENNETH R." <SVANDYKE@PTIALASKA.NET>
1176304	"VAN DYKE, SARAH E." <SVANDYKE@PTIALASKA.NET>